

# Investment Banking Advisory

*Build profitable relationships while lowering costs*

The world has shifted for investment banking. Raising capital has become commoditized, requiring bankers to come up with innovative ways to combat cost pressures and drive more equity and advisory business. In addition, a new breed of investor—and workforce—is demanding self-service and other options for interacting. Firms must invest in technologies that support critical goals now and in the future.

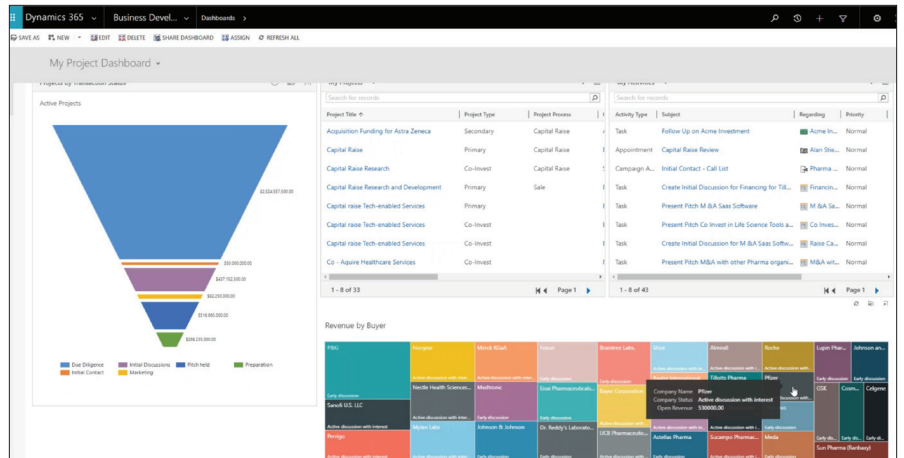
Powered by Microsoft Dynamics 365 for Sales, AKA's solutions for Investment Banking Advisory provide you with a platform for digital transformation...giving you the tools you need to build profitable relationships and provide unsurpassed client service while simplifying processes and cutting costs.

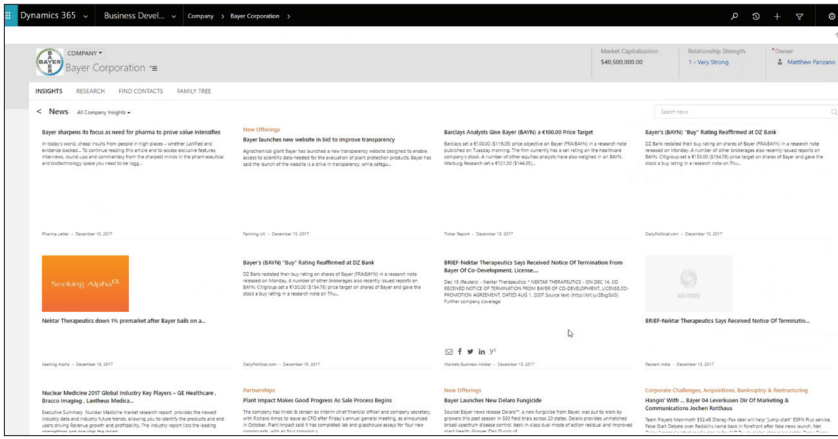
## ATTRACT AND RETAIN PROFITABLE CLIENT RELATIONSHIPS

To be competitive, banks must be very good at attracting the right clients and keeping those relationships healthy and profitable.

AKA's solutions for Investment Banking Advisory provide you with the tools you need to better manage client opportunities and relationships while helping your sales and research teams deepen and tap into your reservoir of client knowledge:

- > The ability to track complex relationships from your perspective as well as your clients' and third parties, across regions and products, to avoid duplication of effort and communication
- > Leveraging Dynamics 365's integration with LinkedIn and other solutions like RelSci to easily learn who knows who within the firm, along with the strength of relationship, to get the most effective client introduction
- > Pipeline and deal flow management to manage and track even the most sophisticated deal structures and ensure they run smoothly, from making the match to closing
- > Effective event and roadshow planning to be sure you are spending time efficiently and with the right clients—and tracking all client interactions along the way—which improves outcomes and helps keep costs down
- > Providing top-notch client service through access to timely intelligence to meet increasing expectations and drive profitability
- > Having consistent, built-in processes for account planning for large, global clients to provide a single client view and powerful insights by division, region, and product





Powered by Microsoft Dynamics 365, AKA's solutions Investment Banking Advisory integrate seamlessly with leading deal and content aggregators, including:

S&P Global  
Market Intelligence

FACTSET

IPREO

PitchBook

RELS  
SCI

## IMPROVE EFFICIENCIES TO DRIVE COST SAVINGS

Attracting and building client relationships is only half the equation. Firms must also capitalize on every opportunity to improve efficiencies with the goal of driving cost savings while reducing risk:

- > Effective meeting management, including distribution of critical meeting notes so the coverage team can take the right actions in a timely manner
- > Understanding of wallet share and deal profitability—even in the most complex entity structures and with multiple platforms and products—by connecting back office systems to CRM and surfacing the critical information needed to drive results
- > Keeping up with constantly changing regulations to ensure compliance requirements are met and security of data is ensured without impacting the firm's ability to access and analyze critical data
- > Automated and transparent client and product onboarding with alerts and exception handling to facilitate reduced time to value

## Why AKA?

While point solutions might provide “out-of-the-box” features that address some of the challenges you face, they cannot handle your unique processes. Our financial services experts have worked with leading firms to help transform their businesses.

- > Designed and implemented solutions for more than 100 financial services clients, including:
  - \$1.5T Asset Manager
  - \$30B Asset Manager
  - \$240B Asset Manager
  - \$100B RIA/Wealth Manager
  - \$30B Hedge Fund
  - \$1.1T Retail Bank
  - \$90B Private Equity Firm
- > Migrated firms from Salesforce.com, Satuit, ProTrak, SalesLogix, ACT!, Onyx, and on-premise versions of Microsoft CRM
- > Implemented enterprise-grade solutions with thousands of users, global rollouts, complex system integrations, and large-volume data migrations
- > Designed and implemented critical data access, control, and information security policies for financial institutions

## ABOUT AKA ENTERPRISE SOLUTIONS

AKA specializes in making it easier to do business, simplifying processes and reducing risks. With agility, expertise, and original industry solutions, we embrace projects other technology firms avoid—regardless of their complexity. As a true strategic partner, we help organizations slay the dragons that are keeping them from innovating their way to greatness.

