

Global Investment Management Authority Capitalizes on Emerging Markets through Digital Transformation with AKA Enterprise Solutions and Microsoft Dynamics 365 for Sales

With more than 2,500 professionals in 14 countries, this firm is one of the most recognized brands in asset management and runs the world's largest bond fund.

THE GOAL: RE-TOOL SALES AND SERVICE TO CAPITALIZE ON RAPIDLY EXPANDING GLOBAL MARKETS

The firm has maintained a stellar reputation in the bond market for 45 years. However, their on-premise CRM system, which was highly customized and outdated, was holding them

back from capitalizing on new and expanding markets. The biggest opportunity centered around the growing population of retirees living longer and shifting investment strategies from equities to fixed income.

The firm was having difficulty making decisions around its global sales and investment strategy. Data was incomplete and inaccurate, reporting was poor, integrations with other tools weren't working, and managers had no visibility, so the sales team was wasting time following the wrong

opportunities. In addition, system performance had deteriorated due to over-customization, so employees were no longer using it.

Not only was the firm ill-equipped to capitalize on this new opportunity; other areas of the business were suffering:

- > The firm operates in locations around the globe that are very highly regulated, some much more than the US. The current system was not equipped to accommodate the varying regulatory and compliance requirements to which the firm was required to meet.
- > In this industry, recruiting is critical but challenging. A firm must stay on the cutting edge of technology and processes to attract and retain aggressive, competitive professionals.
- > With more than a thousand account managers selling the firm's products around the world, it was vital to have the ability to work remotely.
- > The IT team was overwhelmed with problems and demand created by poor performance and other issues. The firm needed to outsource its IT infrastructure.



To take full advantage of the opportunities available in emerging markets, the firm's sales team needed the ability to make fast, informed decisions on a global scale. Thanks to the deployment of a Cloud solution, they are realizing benefits at an international level.

Tom Berger
Vice President, Financial Services
AKA Enterprise Solutions

HIGHLIGHTS

- > Microsoft Dynamics 365 for Sales, deployed in 14 countries
- > Microsoft Azure
- > Modern Workplace: Office 365, Power BI
- > Partnered with AKA for change management and global deployment
- > Microsoft positioned as long-term Cloud partner

SOLUTION & RESULTS: GLOBAL COLLABORATION, GLOBAL INSIGHTS, GLOBAL GROWTH

The firm recognized the need to move to a new solution in the Cloud—but also saw a chance to re-evaluate business processes and engage in true business transformation.

Very large, global organizations like this one struggle with business transformation because of huge, established infrastructures, large numbers of employees and customers, and ingrained processes. But the firm knew the time was right—starting where transformation could make the biggest impact: Sales.

This required a thorough evaluation of the situation. Should the firm stay on Dynamics, migrate to the Cloud, or replace Dynamics with Salesforce? When the team recognized what the power of the Microsoft platform could bring to the business in terms of performance, scalability, user adoption (using tools that were already familiar, like Office 365), and total cost of ownership, they selected Dynamics 365 over Salesforce.

When it came to deciding on a partner, it was an open-and-shut case: the firm had worked with AKA Enterprise Solutions (formerly Green Beacon Solutions) to implement Dynamics CRM several years ago and was extremely pleased with the experience and outcome. Partnering with KPMG (operating as the firm's change management consultant), AKA implemented Dynamics 365 for Sales on Azure, including a native mobile client on iPhones and iPads and integrations with Office 365, a third-party data warehouse hosted in-house, and other key applications.

The firm is now operating successfully with the Microsoft platform and is thrilled with the results.

- > The global sales team has been unified, using consistent, efficient processes and integrated systems:
 - Instead of multiple phone calls attempting to communicate or attain vital stats, everything is available through a clean user interface and efficient reporting, empowering managers to make effective decisions for the entire sales operation, from New York to Singapore.
 - Sales people are armed with the data they need understand relationships and pursue the right opportunities, including the growing baby boomer market. That means more focused selling—which yields higher profits and better margins.
- > With Azure as the foundation, performance is excellent and data is in sync, regardless of location:
 - Customizations and configurations conform to standards, so upgrades are seamless and keep the firm up to date with the latest Microsoft developments.
 - An additional advantage: With Microsoft as its Cloud provider, the firm has full, expert support across the globe.
- > With a Cloud solution, the internal IT staff no longer carries the burden of performance, upgrades, and compliance responsibilities. In particular, it would be nearly impossible for a solution hosted out of the New York office to be effectively used on the other side of the world. With Microsoft's global data center infrastructure and data replication the Cloud, the firm has a true, global solution that can be used by everyone.



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.

