

# Rapid Application Development for Capital Markets with the Microsoft Power Platform

When off-the-shelf software only meets part of your needs, but building a custom application is too costly and time consuming, the Microsoft Power Platform bridges that all-important gap. It combines Microsoft Power Apps, Power Automate, and Power BI into a low-code, rapid application development environment that AKA can put into action to build apps, automate workflows, and extend the software solutions you already use.

The result: Exactly what you need to accelerate your vision—in days, not months, and at a lower cost than traditional software development.



## A PLATFORM AND PARTNER THAT MOVE AT THE SPEED OF CAPITAL MARKETS

The key to consistent, profitable growth in today's volatile and fiercely competitive financial markets is to take advantage of technology ...quickly and cost-effectively. The right solution ensures your ability to continuously innovate and surface the next best action without breaking the bank—and the right partner puts that solution into action.

In the business of empowering innovation for 30+ years, AKA Enterprise Solutions is 100 percent focused on the Microsoft platform as the foundation of our financial services solutions. Our Financial Services experts have decades of experience in the industry, supported by strong technical expertise. They have helped more than 130 financial services institutions worldwide to dramatically improve the way they drive, measure, and manage critical business processes.

### Cases In Point

**Automated Client Reporting from Salesforce:** The asset management arm of a leading life insurance company was running the risk of penalties and losing “massive” investors if they failed to issue monthly performance reports according to specific regulations. They did not want to replace Salesforce as their SFA solution, but the option of building a reporting solution within Salesforce was going to be cost-prohibitive and time-consuming. AKA built a Power Platform solution surrounding Salesforce that streamlined the process, creating empowered, happy employees who can now focus on delivering a white-glove customer experience.

**Client Engagement Hub with Next Best Action within Dynamics 365 CRM:** A global asset manager with 1,500 client-servicing team members wanted to enable marketing and sales to double sales growth. The current system had a poorly designed user interface, lacked personas, and offered no insights for next best actions. Due to lack of integration, leads were manually uploaded to Marketo. AKA used the Power Platform to design and roll out in just 3 months a Client Engagement Hub with Next Best Action, integrated with Dynamics 365 CRM and Marketo.

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## Cases In Point , continued

**Mobile Trade Approval App Integrated with Salesforce:** Portfolio managers for an alternative investment firm managing \$32 billion were inundated with emails for trade approvals. Without the approvals, the firm was at risk of steep FTC fines. They needed an easy, fault-proof way for portfolio managers to approve and disapprove trades from mobile devices. In a 1-day workshop, AKA designed a Power Platform solution that integrates with Salesforce, enabling portfolio managers to approve trades with the click of a button on their mobile phones.

Whatever your business—investment banking, wealth management, asset management, hedge fund, private equity—AKA can put the Power Platform to work supporting the evolving business processes that ensure your ability to handle the entire life cycle, from capture to settlement:

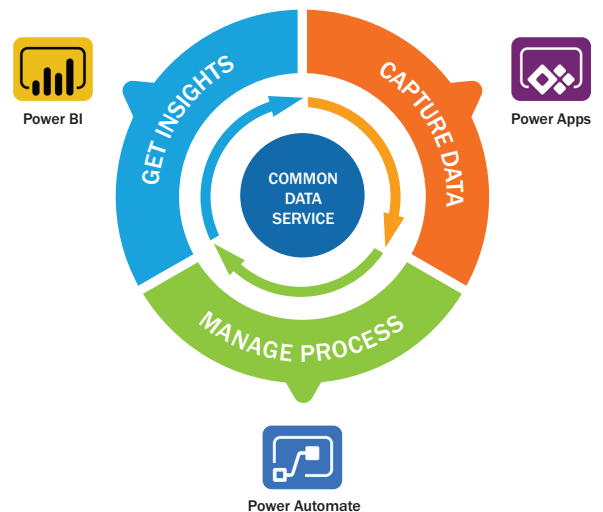
- > Take full advantage of customer information to create targeted offers, identify high-value clients, and help increase share of wallet
- > Help win customer loyalty and engender trust through personalized client services across multiple channels
- > Automate key tasks and processes to boost operational efficiencies and utilize core competencies
- > Help reduce total cost of ownership (TCO) and extend the value of your IT investments through intuitive Power Apps and simplified integration with existing systems

## WHY WE WORK WITH THE MICROSOFT POWER PLATFORM

AKA's Microsoft experts have used the Power Platform to empower clients with a broad range of solutions, from mobile document uploaders and contract management to automated client reporting and mobile trade approval from Salesforce. With more than 200 out-of-the-box connectors and the ability to create custom connectors, the possibilities are endless.

- > Improve productivity and efficiency with apps designed specifically for your business processes
- > Enable collaboration by connecting to your data, wherever it is, with automated workflows
- > Guide your users through processes to keep them on track and ensure data consistency
- > Get a single source of truth across your organization with data standardized by the Common Data Service
- > Have confidence in a solution backed by experts in Dynamics, Azure, and system implementation and integration

## MICROSOFT POWER PLATFORM



## 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.

