



the results company



SOLUTION BRIEF | Financial Services

Rapid Application Development for Capital Markets *Bridging Gaps with 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 HSO 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.

Moving 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, HSO 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.

Whatever your business—investment banking, wealth management, asset management, hedge fund, private equity—HSO 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

Case 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. HSO 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.



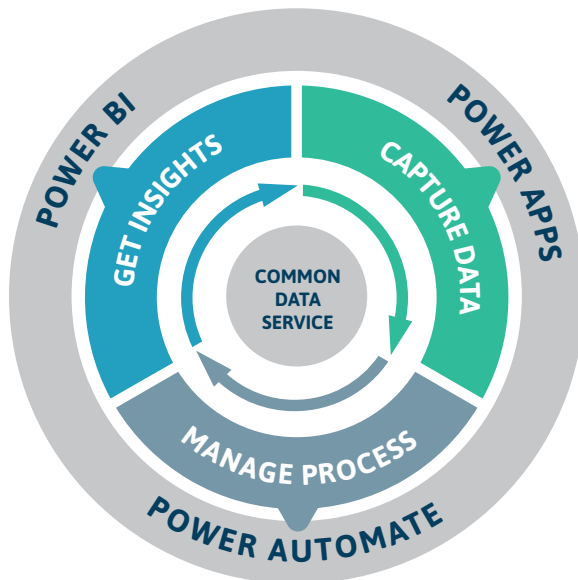
Gold Cloud Platform
Gold Cloud Business Applications
Gold Cloud Customer Relationship Management
Gold Enterprise Resource Planning
Gold Application Development

- 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

HSO'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 Dataverse
- Have confidence in a solution backed by experts in Dynamics, Azure, and system implementation and integration



Cases In Point

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. HSO 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.

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. In a 1-day workshop, HSO 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.



the results company

Empire State Building
350 5th Avenue, Suite 6902
New York, NY 10118

T (212)502-3900 | info-usa@hso.com