

# HSO WIN WIRE: HSO Takes Out Salesforce for a DCA Win with Dynamics 365 CE, Finance, Talent, and Marketing for an Asset Management Firm

<b>Customer Details</b>	Rockefeller Capital Management is a leading independent, privately-owned financial services firm offering global family office, asset management and strategic advisory services to ultra-high-net-worth individuals and families, institutions and corporations.
<b>Sold To</b>	CTO
<b>Challenge</b>	<ul style="list-style-type: none"> <li>▪ This firm, led by financial services “heavy hitters,” had an aggressive goal of reaching \$100 billion in assets under management within the next 4 years</li> <li>▪ The CTO’s vision was to have the firm completely on the Microsoft platform, starting with asset management for institutional sales, followed by other LOBs</li> </ul>
<b>Solution</b>	<ul style="list-style-type: none"> <li>▪ Dynamics 365 Finance and Talent, including core HR and Attract and Onboard</li> <li>▪ Dynamics 365 CE</li> <li>▪ Dynamics 365 Marketing</li> <li>▪ HSO’ DynamicsAdvantage Multi-Entity Financial Management for Financial Services</li> <li>▪ Integration with Ceridian for Payroll</li> <li>▪ The CTO's vision, HSO’s technical/Dynamics expertise, and the successful implementation of Dynamics 365 CE gave the firm</li> </ul>
<b>Outcome/Impact</b>	<ul style="list-style-type: none"> <li>▪ Ability to service family offices more efficiently – 50 entities</li> <li>▪ Support the firm’s plan to meet aggressive growth goals</li> <li>▪ Ability to transition to an asset management firm, complying with regulatory requirements</li> </ul>
<b>Partner Name/ID</b>	HSO – Cloud-Based Transformation Experts – D365/Azure/BI/Business Productivity
<b>Industry</b>	Financial Services
<b>Solution Area/Practice</b>	Business Applicationa/Finance, Talent, HR, Attract & Onboard
<b>Workload</b>	4 - Dynamics 365 for Sales, Finance, Talent, Marketing
<b>Sales Play</b>	Activate Digital Selling, Build Agile Business Processes, Generate Value with Proactive Insights
<b>Replaced</b>	Salesforce, Legacy AS/400 solution
<b>Won Against</b>	Committed to the Microsoft platform for the entire organization

ROCKEFELLER  
CAPITAL MANAGEMENT

## HSO Team



Tom Berger  
VP, Financial Services



Jim Bretschneider  
EVP, Solutions



Michael Elbrish  
Senior Solution Architect

## Microsoft Team



Jeremy Shields  
AE



Scott Ballen  
Specialist



Richard Greene  
Specialist



the results company