

HSO WIN WIRE: HSO Beats Out Salesforce with Dynamics 365 Sales and Offers a New Approach to a Challenging but Lucrative Asset Management Channel



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Customer Details	Calamos Investments is a global investment firm with \$25B AUM, offering innovative investment strategies, including alternatives, multi-asset, convertible, fixed income, and equity.
Sold To	CTO, Head of PMO
Challenge	<ul style="list-style-type: none"> This firm has 3 channels—80% through intermediaries (wholesalers), 15% institutional, and 5% private wealth—causing issues working effectively with its largest channel, intermediaries, who are traditionally a very difficult group to “control” The homegrown system was old, on-premise, required too much support, and couldn’t meet changing needs/growth plans The firm thought they just needed software; however, what they truly need was a fresh, more successful way to engage wholesalers and facilitate mutual success
Solution	<ul style="list-style-type: none"> Dynamics 365 Sales HSO’s DynamicsAdvantage for Asset Management
Outcome/Impact	<ul style="list-style-type: none"> The new solution replaced 3 solutions, reducing maintenance and costs while increasing visibility across the organization The solution proposed by HSO didn’t just have the functionality the firm needed; it fundamentally changed the way the firm’s inside sellers engage with intermediaries. This more prescriptive, concrete approach created a management layer of segmentation and direction for a win-win for both the firm and the intermediaries they work with The insight Dynamics will provide will also help the firm uncover and pursue new opportunities, even providing a significant opportunity to grow their institutional business because the intermediary channel is somewhat saturated Through this engagement, AKA established a very positive relationship with the firm’s consulting firm that has already resulted in new opportunities and won business.
Partner Name/ID	HSO – Cloud-Based Transformation Experts – D365/Azure/BI/Business Productivity
Industry	Financial Services
Solution Area/Practice	Business Applications/Sales
Workload	Dynamics for Sales
Sales Play	Activate Digital Selling
Replaced	Homegrown system, Selentica
Won Against	Salesforce/Hitachi

