

HSO WIN WIRE: First Customer Engagement, Now Accounting!

Wealth Management Leader Continues the Ground to Cloud Journey by Moving Another Workload to Azure with a Migration from Great Plains to Dynamics 365 Finance

Customer Details	CAPTRUST is a retirement planning/investment advisory firm with 500+ employees, 35 offices, 5,000+ clients, and \$240B+ AUM
Sold To	CFO, Controller
Challenge	<ul style="list-style-type: none"> The firm is on a ground-to-cloud, digital transformation journey, and the accounting department was still using an on-premises version of Great Plains. The budgeting process relied too heavily on Excel. It was cumbersome and lengthy. The accounting department needed a way to support the firm's rapid growth trajectory (organically and by acquisition) and goal to expand its client base threefold within the next 3 to 5 year—WITHOUT adding staff The team needed a faster, more efficient way to consolidate the financials of multiple legal entities
Solution	<ul style="list-style-type: none"> Dynamics 365 Finance Dynamics 365 Sales HSO's Multi-Entity Financial Management HSO's Azure Integration Framework,
Outcome/Impact	<ul style="list-style-type: none"> Along with increasing Business Applications Billed Revenue, this deal enables CAPTRUST to get even more value out of the Dynamics 365 platform, which will help solidify a multi-million dollar Enterprise Agreement renewal in December 2019 Deal facilitated further adoption of the Microsoft platform and progression of the ground-to-cloud journey: Streamlined critical accounting processes, including complex budgeting and consolidations of acquired firms, while keeping the finance team lean The accounting group is now able to provide better support for firm's growth and expansion goals
Partner Name/ID	HSO – Cloud-Based Transformation Experts – D365/Azure/BI/Business Productivity
Industry	Financial Services
Solution Area/Practice	Business Applications/Finance and Operations, Sales
Workload	Dynamics 365 Sales, Dynamics 365 Finance, Azure
Sales Play	Activate Digital Selling, Enable Always-On Service, Manage Financial Risk & Reduce Fraud, Build Agile Business Processes Generate Value with Proactive Insights
Replaced	Great Plains
Won Against	No other solution or partner considered; committed to Microsoft Platform and HSO



HSO Team



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