

Case Study

**Green Beacon
Solutions
Experienced
Consultants and
Proven Delivery
Model Ensures
Successful
Microsoft
Dynamics® CRM
Implementation
for Risk-Averse
Investment Firm**



Green Beacon's Customized Microsoft Dynamics CRM Solution Delivers Improved Reporting, Enhanced Analysis and Portfolio Modeling for Investment Firm

At A Glance

Financial Account Management - Tracks portfolio managers, account balances and historical performance.

Account Risk Management - Understands the risk of the client leaving the firm, enabling proactive mediation when issues arise.

Mobile Availability - Ensures CRM access to users whether on the road or in remote offices.

One of the leading international investment management firms faced a major decision in regards to its CRM system. The existing solution, built on Onyx, was about to become prohibitively expensive to support. The company had to decide – upgrade to the new version of Onyx, or move to a new solution entirely.

The decision was a big one for the organization because of the critical nature of the CRM tool. It serves as the foundation for customer management, support, reporting and administration for this international organization. Over time the Onyx solution had become highly customized to support the very specific business processes required by the firm. The company carefully considered the advantage and benefits of remaining with Onyx, and compared them to the operational simplicity, flexibility, mobility, ease of use, and cost of the Microsoft Dynamics CRM solution, and decided to make the switch.

Because this would be a very high profile and critical migration, the investment firm carefully considered a handful of experienced Microsoft CRM systems integrators. Ultimately the firm chose Green Beacon Solutions for a number of reasons. Green Beacon offered the unique expertise that comes from years of experience helping financial services and investment management firms on both the Onyx and Microsoft

CRM platform, and Green Beacon demonstrated project management and consulting skills that surpassed their competitors.

“We are well-known for our conservative and low-risk approach to investments that deliver consistent and dependable returns for our clients,” said the firm’s executive vice president of CRM. “Abandoning our existing CRM platform was a high-risk project that we did not undertake lightly, we needed a partner whom we could trust with our critical business processes and who could deliver a custom solution, on time and on budget. Green Beacon was that partner.”

Delivering a Custom Solution

Because the entire team of 700 users across more than 9 offices around the globe relied on the existing CRM solution to manage business – including customer communications, portfolio generation, reporting, activity tracking, updates and account management- the investment firm was concerned a new solution would require too much training and meet with significant resistance from busy and already successful employees.

To limit the disruption the migration would have on the company, Green Beacon worked with the firm to completely customize Microsoft CRM to mirror the processes and systems already in place. The team made enhancements and improvements where possible – optimizing performance, reducing the number of “clicks” required to complete a process, and upgrading the back-end system infrastructure, but worked to keep the same workflow and automation the company already had in place.

Ultimately, the new Microsoft CRM solution extends beyond customer relationship management and includes more than 100 custom entities, or business objects (account fields, contact fields, etc) and is truly a model of the firm’s operational process. The flexibility of the Microsoft CRM system and the talent and experience of the Green Beacon team combined to ensure the solution conforms to the firm’s processes, rather than making the firm conform to the system.

Serving as the operational platform of the company, and integrated with the firm’s SYBASE solution, Microsoft Dynamics CRM provides the organization with the following:

- **Financial Account Management** – A critical customization allows the organization to perform financial account management – tracking portfolio managers, account balances and historical performance in six month, five year and ten year increments.

Testimonial

“As an investment management firm, we are well-known for our conservative and low-risk approach to investments that deliver consistent and dependable returns for our clients. Abandoning our existing CRM platform was a high-risk project that we did not undertake lightly, we needed a partner whom we could trust with our critical business processes and who could deliver a custom solution, on time and on budget. Green Beacon was that partner.”
- executive vice president of CRM at the investment management firm

Case Study - Investment Management

- **Client and Account Risk Management** – A Green Beacon customization allows the company to determine account risk. By evaluating performance of the client's investments as well as account interactions, the company is able to assess the risk of the client leaving the firm. With this insight they can more proactively mediate issues and correct problems before the account is in jeopardy.
- **Financial Account and Portfolio Modeling** – Customizations to the system allow the firm's managers to create custom portfolios, and allows institutional investors to define client portfolios and analyze their performance against benchmarks.
- **Account Activity Tracking** – Integrated with Microsoft Outlook, this feature allows account managers to track meetings, calls, status and satisfaction levels of their account.
- **Reporting** – The firm reports on accounts, performance, customer wins and a number of other factors easily within the system.
- **Contact Management** – The company tracks both individual investors and group investments within the system, this includes tracking existing customer relationships, reporting on portfolios and accounts, while also identifying, nurturing and managing new investments.
- **Mobile Availability** – Green Beacon implemented Microsoft CRM and the Outlook client in a Citrix virtualized environment to ensure the solution is available to business users regardless of location – whether on the road or in remote offices.

“With Microsoft Dynamics CRM we have a completely customized, well-supported solution that will drive business management overall and will scale with the company as we grow,” said the executive vice president. “We are in a great position in terms of performance, cost and opportunity to further improve business operations.”

Superior Project Management and Consulting

With the firm's commitment to low-risk endeavors, it was of utmost importance to the management team that they chose the right systems integration and consulting team to take them through this year-long, complex and fluid implementation with minimal disruptions, and to do so on-time and on-budget. Green Beacon Solutions proved capable of the task, demonstrating a number of important skills throughout the engagement, including:

- **Proven Project Management** – Green Beacon's proven project management skills ensured the project remained on-time even as three groups of developers worked

Testimonial

“We felt more exposed than we would like when we made the critical decision to migrate away from our existing platform and onto Microsoft CRM, but the benefits of the system outweighed the risk. With the project of utmost importance to our business, we carefully considered a number of integrators, and ultimately chose Green Beacon because of the diligence, commitment and exceptional experience they demonstrated. Given the complexity of the project it is a true testament to the consultants and engineers at Green Beacon that it went as smoothly as it did.” - *the firm's EVP*

Case Study - Investment Management

simultaneously on multiple aspects of the program – from design to development and testing. Juggling multiple phases at the same time ensured the project would be completed before the deadline – which was driven by the old systems end of support life.

• **Deep Technical Expertise in Microsoft CRM and Onyx** – Green Beacon was uniquely suited for the project as the company’s team possessed decades of experience working on the Onyx solution, as well as with Microsoft CRM. This unique combination enabled Green Beacon to model the best attributes of the custom Onyx solution on the flexible Microsoft CRM platform, and helped limit the disruptions and training that would be needed for the team.

• **Commitment to the Client** – Green Beacon’s consulting team worked closely with the client as true partners, helping them mold the Microsoft CRM application to best meet their needs – rather than make the firm mold to the functionality of the system. Green Beacon also provided hands-on support for training and during the initial roll-out in the company’s offices around the globe. This ensured any initial hiccups could be addressed quickly.

“We felt more exposed than we would like when we made the critical decision to migrate away from our existing platform and onto Microsoft CRM, but the benefits of the system outweighed the risk,” said the executive vice president. “With the project of utmost importance to our business, we carefully considered a number of integrators, and ultimately chose Green Beacon because of the diligence, commitment and exceptional experience they demonstrated. Given the complexity of the project it is a true testament to the consultants and engineers at Green Beacon that it went as smoothly as it did.”



GREEN BEACON SOLUTIONS

Green Beacon Solutions implements integrated financial, supply chain, sales automation, and marketing business solutions built on Microsoft technologies within the distribution, professional services, banking, and manufacturing industries.

Since 2001, we have delivered unique software, consulting, and managed service solutions, built upon our project LightShip Methodology and integrating our CompassPoint Solution software accelerators to help clients quickly and cost-effectively meet their goals.

Our clients demonstrate their satisfaction through repeat engagements and service recommendations. By choosing Green Beacon Solutions, companies choose a trusted advisor with recognized market experience who guarantees project success by meeting their business objectives, project budget, and timelines.

Company:

- Established in 2001
- Headquartered in Boston, Massachusetts
- Offices in New York, Philadelphia, and Houston
- Specializing in the design, development, and implementation of Microsoft Dynamics Business Solutions and after-market support services for many leading ERP and CRM software packages.
- Microsoft Gold-Certified Partner
- Serving over 100 Microsoft Dynamics customers globally