



# Bridges Fund Management

Specialist Private Equity firm deploys CRM solution to support growth needs in an increasingly competitive and dynamic industry

## Summary:



70 man Venture Capital and Private Equity firm



Rapid deployment with Xpedition's Private Equity CRM Accelerator



Guidance and support through development and adoption



Enhanced deal flow management and performance



Digitally enabled investor relations capabilities

## The Challenge:

### Digital transformation in a changing marketplace

Bridges is a rapidly expanding firm, growing across the UK and US. They were seeing an increase in headcount, a more dispersed workforce and a wider scope of operations. Bridges lacked a single, complete, up-to-date and searchable database of all contacts, meetings, public emails, notes and events. Key business processes were inefficient and the team was missing opportunities for successful collaboration. Without one accessible overview of the company's activities, employees were potentially unaware of relevant work in progress and activities taking place inside and outside of the firm.

Bridges also needed to act responsively to industry and market pressures; compliance requirements to provide increased risk transparency, and investor expectations for efficient data management and modern digital communications.

Key goals were to bring visibility and structure to business data and communications, internally and externally.

**“Xpedition's expertise within the Private Equity sector has been invaluable, enabling us to deploy a quality solution tailored to our needs within tight timeframes.”**

Zoe Burgess, Project Ambassador,  
Bridges

## The Process:

### An accelerated approach to CRM solution delivery

Xpedition worked with Bridges to help refine the CRM business case and create a detailed scoping document, to match system capabilities with business requirements.

The Private Equity CRM Accelerator, refines Microsoft Dynamics to meet the core needs of this industry, dramatically reducing the time to customise a best-fit for any Private Equity and Venture Capital firm. With less time needed to design a best-fit solution, Xpedition were able to migrate data, train staff and then implement an effective solution in less than 4 months. The team worked with project ambassador Zoe Burgess throughout the programme.

**“It's been particularly helpful in making sure we effectively address key industry challenges such as confidentiality, regulation and communication. They worked closely with us to translate our commercial needs into a solution that can deliver clear value to the business.”**

Zoe Burgess

## Adopting technology. Seamlessly.

Xpedition understand the importance of user adoption. Our approach makes sure that everyone has their say throughout the project, so that when the system goes live, it is exactly what's expected and works smoothly across your firm.



### The Solution: Supporting closer business relationships

The CRM deployment now provides a reliable, secure and scalable communications platform across three critical business areas – investor relations, fundraising and deal flow. For general business development and admin, the CRM solution manages contacts, meetings, notes and client emails across the firm, allowing targeted communications and a 360 degree view of all activities.

Fundraising is now simpler to prioritise and implement manageable action plans, using simple Outlook reminders and team-wide communications tools. For deal flow, CRM now supports the team's origination strategy with accurate data about the highest performing direct and indirect routes to market.

Xpedition's Private Equity Specialist, Jon Archer said *"This project is one of many great examples of how Xpedition's Private Equity CRM Accelerator can enable firms to quickly and effectively go-live on time and within budget. By cutting the time needed for development and customisation, Bridges were able to get their hands on an ideal solution sooner and start seeing the benefits quickly."*

### The Future: A platform to support ongoing business growth

Bridges is now equipped with a CRM solution that will transform the success of business operations and foster a culture of digital communication and collaboration. Having recognised the importance of CRM user adoption across the entire workforce, Bridges have planned regular feedback sessions, so every business unit can contribute to the future development of the CRM solution to meet their ongoing needs.

**"With our rapid growth and ambitions for the future, we are now equipped to continue expanding, with a foundation of secure, reliable data and well supported processes that everyone in the business can buy into. The insights we gain will refine our decision-making and actions."**

Zoe Burgess

### About Xpedition

At Xpedition we guide your path to growth, through the implementation of intelligent cloud-based business applications. We help our clients to understand how technology can empower their business in real terms, and we deliver.

Previously known as TouchstoneCRM, we offer so much more than CRM and business software. We deliver real business value through expert consultancy. We're known for our questioning nature and for challenging the status quo.

We succeed when you succeed, inspiring clients with insight led guidance. Our market leading expertise and industry knowledge will help your business to reach its goals.

We understand your industry. Our experts are passionate about sharing their knowledge, revitalising client experiences, improving operational efficiency. At Xpedition, we'll show you the way.

**Fast-track your journey to CRM success with Xpedition.**

+44 (0)20 7121 4705  
info@xpedition.co.uk  
www.xpedition.co.uk

46 Worship Street  
London  
EC2A 2EA