



Private Equity CRM

The best of all worlds for a growing firm: a proven Microsoft platform supporting specialist Private Equity CRM

Summary:



Proven, leading Private Equity solution supports decision making



Mobile-optimised for global, 24/7 insight and access



Best-of-breed Microsoft platform for integration and futureproofing



Excellent, hands-on consultant with deep sector knowledge



Rapid, friction-free deployment

“We’d already chosen Office 365 as our best-in-class team technology platform, so Microsoft Dynamics 365 was an obvious choice. It’s a long term strategic technology solution - familiar, intuitive, secure, future proof, and backed by Microsoft’s continuous development.”

Maria Carradice, Portfolio Director,
Mayfair Private Equity

The Challenge:

Secure, mobile fund data and investor relations

Mayfair Equity Partners provides buyout and growth capital to dynamic businesses in the technology, media, telecoms and consumer sectors. Founded in 2014, Mayfair’s portfolio includes YO! (operators of the Yo! Sushi restaurant chain), Pixomondo (an international visual effects studio), Talon Outdoor (a specialist out-of-home media agency) and Superawesome (a digital marketing firm focused on kid-safe digital advertising.)

Mayfair’s founders recognised right at the start the need for a Private Equity solution to support fund growth, communication and investment as the firm grew. Having initially launched using standard office applications for data recording and processing, Mayfair soon required a more sophisticated, reliable, responsive and collaborative way to handle fundraising, investor relations and deal flow information.

Xpedition’s Private Equity Business Manager Jon Archer adds, “With increasing competition for investment opportunities and the importance of proactively engaging investors, it was important from the very start for Mayfair to have a solution that was easily accessible, secure and intuitive, providing them with the right information at the right time.”

The Process:

Expert Private Equity knowledge and bespoke technology

Maria Carradice, Mayfair’s Portfolio Director, headed the project to find the technology solution and service partner that was right for the firm. She evaluated several options before selecting Xpedition.

On the shortlist were a number of solutions developed purely for Private Equity. Maria chose Xpedition and their Dynamics 365 Private Equity Accelerator as the preferred solution because of its intuitive nature and seamless interoperability with Office 365.

With Mayfair’s continuing growth and day-to-day reliance on its ever-expanding contact information and data, rapid deployment without business disruption was key. Xpedition started work at the beginning of January 2017 and the system went live by the end of February.

Xpedition’s senior consultant Nealesh Patel worked closely with Maria Carradice to understand the firm’s requirements and to customise Xpedition’s Private Equity Accelerator to suit Mayfair’s strategy and operation. Integrating existing contact information accurately was key to ensure a continuing level of service and communication to investors.

“Xpedition’s Private Equity Accelerator customises Dynamics to fit our needs and gives us a robust, Private Equity specific platform that can adapt and evolve with us”

Maria Carradice, Portfolio Director, Mayfair Private Equity

“Working with Xpedition has been a frictionless experience. They provided excellent references at the point of selection and everything their previous clients said proved true for us too. Our consultant was experienced in Private Equity, diligent, and quickly grasped our priorities. Deployment was rapid and smooth, on time and on budget.”



The Solution:

A trusted platform for proven Private Equity CRM

With Xpedition's solution, Mayfair has the best of all worlds. Firstly, a custom-built Private Equity CRM system, ready designed with the functions and features needed in this specialist investment sector and therefore easy to deploy rapidly, with expert, hands-on consultant support.

Secondly, the secure, proven, market-leading, mobile-optimised platform base of Microsoft Dynamics, directly integrating with Microsoft Office applications including 365 and Outlook. With Microsoft behind this trusted platform, ongoing support and investment is assured, with continual development and enhancements as technology and markets advance.

Thirdly, a solution fine-tuned to suit Mayfair's business model and practice, including selecting and integrating specialised third party tools to provide additional custom functions. Xpedition's sector expertise and an experienced consultant on-site means that Mayfair benefits from a proven solution with the potential to add bespoke features from leading specialist vendors like Preqin (providing private market data sets.)

The Future:

Private Equity Accelerator supports growth and success

A steady succession of successful acquisitions and investments has established Mayfair as a strong performer. The firm's flexible, collaborative and socially responsible approach to investment achieved recognition with a BVCA 2018 Responsible Investment award.

Xpedition's Jon Archer says, “Our Private Equity Accelerator is an ideal choice to support Mayfair's progressive and ambitious outlook. It combines market-leading Private Equity tools and a familiar, trusted Microsoft interface with potential to scale with the firm's growth, keeping pace with ever-evolving technology to meet demanding internal and investor expectations.”

“The technology has been easy to adopt, giving us the comprehensive, specialist Private Equity investor and deal management capability we need to support our growth and meet the exacting demands of our team, business partners, and investors.”

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.

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