



Oakley Capital

Rapidly deployed deal and investor focused Private Equity CRM featuring secure, full-featured mobile access

Summary:



Full mobile capability to support a fast-paced, multi country organisation



Expert guidance from an industry knowledgeable Xpedition consultant



Scalable solution to keep pace with ongoing growth



Rapid implementation of a highly secure and compliant solution for PE



Rapid user adoption due to a familiar and intuitive user interface (UI)

The Challenge:

A scalable platform for firm-wide use

Established in 2002 by Peter Dubens and David Till, Oakley was formed to create an investment firm that really understands entrepreneurs and founders. The team looks for primary deals outside of auction processes, with exciting businesses cut out for success.

As the firm has grown to bring in people with complementary expertise, the team has retained an entrepreneurial mindset and a culture of openness and collaboration. Oakley now operates from offices in London and Munich, with a portfolio of investments concentrated in three core areas – consumer, education and TMT (technology, media and telecommunications).

Oakley's team knew they wanted to support expansion and growth with intelligent deal and investor management systems. Relying on Excel spreadsheets and a project collaboration tool wasn't enough. They needed a stronger, more intuitive and more scalable solution, specifically designed to cater to the unique needs of private equity (PE).

The requirement was for a dependable solution that everyone in the business would use to maintain a single source of information about every deal, investor and intermediary. It had to maintain comprehensive records of new and existing interactions across the organisation, enable insight into co-investment activities, and allow Oakley to communicate more effectively with investors about relevant target and portfolio companies.

The Process:

The best CRM solution for Oakley's needs

Oakley embarked on a systematic comparison of vendors and solutions, using six key criteria to evaluate their shortlist of three, including DealCloud and Salesforce. Xpedition's Microsoft Dynamics solution emerged as the clear winner, fulfilling Oakley's wish-list for Microsoft office integration, seamless mobile functionality, the ability to customise to specific requirements, reporting and the ability to take advantage of the inbuilt functionality of leading 3rd party applications such as Preqin.

Lucy Money, Xpedition's Dynamics Project Manager and CRM consultant, worked on-site with the Oakley team, responding to their feedback and helping to ensure that the project objectives were met throughout the planning and implementation. This strong partnership approach was designed to move the project forward rapidly to a functional solution in the shortest possible timeframe.

The Solution:

Excellent visibility and decision-making insight

Choosing Xpedition's Dynamics system for Private Equity has given Oakley a complete mobile CRM solution that the team can use on the move, wherever they are in the world. Oakley employees can add or review insights and relationship information, including activity, through Microsoft's leading-edge mobile app. This seamless, 'information anywhere' experience, as well as the ability to make use of standard phone features such as contact lists, the camera or even dictation, has helped to bring additional ease of interaction to the Oakley team.

The ability to work efficiently and with minimal effort when out of the office is key to Oakley achieving its fast-paced operation. The Dynamics CE platform is intuitive and fully integrated with Office 365. Moreover, user adoption is significantly easier due to the familiarity of working with other key Microsoft applications.

The team can generate reports from the dashboard easily, providing a high-level view, as well as more granular detail that shows clearly where deals exist and where action is needed. They can spot the closest matches to their ideal investment, identifying and managing priorities to help with efficient and effective targeting.

“We’ve introduced an element of gamification, challenging colleagues to meet usage targets and ensure continued engagement. It’s a bit of fun that’s working well to keep everyone committed to best practices and ensure the system visibly proves its worth.”

Fred Raikes



The Future:
Keeping Oakley ahead with secure, scalable technology

A huge advantage of Xpedition’s Microsoft Dynamics solution is its proven ability to evolve with the business. The platform can be customised to reflect changing internal processes and compliance requirements. Microsoft’s own investment in the platform was also a key driver for Oakley. Dynamics is renowned for holding the highest accreditation

“We can capture a wider range of information about investors and deals and making them available for real time reporting. It’s easy to analyse information about potential investment and target companies in weekly meetings or even on an hour to hour basis– we know that the insights are correct because everyone has access to the solution at all times, wherever they are.”

Fred Raikes, Investment Director,
Oakley Capital

and compliance standards, including specific sector regulations that meet Oakley’s own rigorous requirements, helping maintain client and deal confidentiality, both now and in the future.

The Oakley team also recognise that CRM is a continuous journey and that their digital strategy is just the start of an ongoing, ever developing process. Like all successful CRM projects, there is a need to keep the solution up-to-date, so the well-established working relationship with Xpedition is paramount.

For example, Oakley is already considering adding further functionality including enhanced communication, event management and investor updates. As Dynamics is designed to embrace a broad range of capabilities, it’s easy to add and integrate further core functions as well as sector specialist add-ons.

Xpedition is excited to continue to working closely with Oakley so that together, we can continue to develop the Dynamics solution, ensuring it delivers the capabilities Oakley requires as it looks to meet the challenges of the private equity industry now, and in the future.

About Xpedition

Xpedition is the smarter alternative to traditional CRM consultancy. Everything we do is designed to make sure you get the full value from your CRM investment. Through our market leading expertise and unique methodology we’ve helped clients to increase sales performance and operational efficiency, improve marketing ROI, transform stakeholder relationships and develop tighter bonds of customer loyalty.

What can we do for you?

“We were very confident that Xpedition was the right partner for us, after a rigorous selection and due diligence process. Their sector experience was clear from the outset. The Xpedition consultants made good recommendations based on best practice and in-depth knowledge helping to ensure a solution that brings real value to Oakley.”

Fred Raikes

Fast-track your journey to CRM success with Xpedition.

To learn more about Xpedition visit:
xpedition.co.uk
Or contact us on
+44 (0)20 7121 4705

46 Worship Street
London
EC2A 2EA