






# Deutsche Beteiligungs AG

Comprehensive, real-time PE portfolio insight for Deutsche Beteiligungs AG

## Project summary:

-  Cloud-based platform for secure, remote and mobile access
-  Global search capability
-  Complete, real-time cross-functional deal flow and fundraising information
-  Real-time reporting with visualisations
-  Easy for users to adopt without extra training

## The Challenge:

### Move to the Cloud and enhance PE CRM capability

DBAG had successfully used Dynamics CRM (as implemented by Xpedition) for several years. Dennis Jankowski, Head of Risk Management, explains: “We were very satisfied with the Microsoft Dynamics platform but wanted to update the look and feel, as well as move to a Cloud solution to give our users secure, mobile access to the system wherever they were working. There were also key features we wanted, such as providing a universal, global search function as well as richer reporting capabilities”.

DBAG explored and benchmarked against other CRM solutions but found them too complex or insufficiently flexible to handle the specialist needs of their private equity business. They made the decision to deploy cloud-based Dynamics 365 with the Xpedition Private Equity Accelerator.

**“A real highlight is the acceptance from colleagues of the new Cloud solution, due to the fact that we can take our CRM with us everywhere on a mobile device and can get everything from the system wherever we are – it’s been crucial this year!”**

Dennis Jankowski, Head of Risk Management, DBAG

## The Solution:

### A leading, trusted Microsoft CRM platform with tailored PE functionality

Dennis Jankowski says, “We have a strong and established working relationship with Xpedition and trusted their track record within private equity. Their expert industry knowledge really helped us to set clear project objectives and refine our requirements.”

The project kicked off with a meeting in London. Xpedition’s Managing Consultant, Nealesh Patel, demonstrated the new platform, showing Dennis and Thomas Weber, Head of Business Development, the clean, modern interface, advanced cloud-based mobile capabilities, and real-time reporting visualisations available through Power BI.

The joint DBAG and Xpedition team moved through clearly defined project steps, from requirements, documentation and budget-setting to deployment, testing, training and roll-out. Specialist partner Synchronicity managed the data migration using its unique Echo Managed Service. This included specialised scripts and a set of custom applications to migrate all the data from a source Dynamics CRM database to the latest version of Dynamics 365 with minimal mapping and intervention.

The impact of the global COVID-19 pandemic meant that further face-to-face meetings were impossible. Despite the challenges, Xpedition was able to use its proven remote deployment methodology to efficiently and effectively progress the project, with even the crucial User Acceptance Testing (UAT) phase being completed during the crisis.

Deutsche Beteiligungs AG (DBAG) is a leading and well-established German private equity company with approximately 80 employees. The firm mainly co-invests through investment entity subsidiaries in mid-sized companies mainly within the DACH-region in the sectors of automotive, industrial services, industrial components, mechanical and plant engineering (e.g. industry tech companies like robotics, automation and digitalization), and also increasingly in the sectors of IT services & software, broadband telecommunication and healthcare services. Since its foundation in 1965, DBAG has used its formidable experience and expertise to implement sustainable, value creating strategies and leverage the development potential of their portfolio companies.

**The Results:****A modern deal and fund insight and reporting platform that supports operational excellence with strong user approval**

The new Dynamics platform means that CRM is no longer just a repository for data and background information about companies and clients. DBAG is using it for example for deal sourcing. Before, these were handled by different departments in different sheets/databases, so the data and deal progression weren't joined up.

Dennis Jankowski explains: "Now, we have information and contact records combined in the system from deal to execution, in a fully digitalised process. This is very important to meet our operational excellence standards. It also supports accurate, efficient, real-time reporting. At our investment team meeting, the team reviews deal ideas, deal pipeline, current deals and performance information at the same time, to give us a clear overall picture.

"Before, it was difficult to pull this together between departments – it took a lot of time and didn't always capture every relevant piece of information. Now, we can identify opportunities very quickly, which can give us a competitive edge in an industry where speed of response is crucial."

Deal and portfolio reports are enhanced by Dynamics Power Platform features, particularly Power BI, which enables DBAG to visualise performance information in meaningful ways. "It's so much more insightful than trying to compare spreadsheets," Dennis adds.

DBAG's users can now access records, reports and analytics remotely using the mobile capability of the cloud solution. This supports mobile working, enhancing DBAG's business resilience and providing greater flexibility for staff, who can be productive and responsive wherever they are.

Looking to the future, DBAG has headroom to improve the reporting suite, using Microsoft's market-leading Power Apps and taking advantage of the latest features as they emerge. In the spirit of DBAG's operational excellence culture, Dennis and Thomas have the power to continually refine the solution in response to evolving market and business needs.

**"Xpedition's system is designed for PE knowledge and competences, with an inbuilt deal flow process. The flexibility of the solution is excellent – it's a great platform that can accommodate our special processes. It's used by lots of areas in our business and it does what they all need. We didn't want a sales solution, which was the only alternative: no other vendor has a Private Equity template like this."**

Thomas Weber, Managing Director, Head of Business Development, DBAG

**About Xpedition**

With 20 years as a Microsoft Gold Partner and more than 630 successful Dynamics 365 projects delivered, Xpedition is one of the UK's leading and trusted Microsoft Dynamics 365 implementation partners.

Built on Microsoft Dynamics 365 and tailored to Private Equity and Venture Capital firms, the Private Equity CRM Accelerator takes all the power from Microsoft Dynamics and makes it relevant to manage Deal Flow, Investor Relations and Fundraising and Reporting.

To find out more about Xpedition and how Microsoft Dynamics 365 can benefit your Private Equity or Venture Capital firm, contact one of our experts today.



**Deutsche Beteiligungs AG**

**Fast track your journey to financial management success with Xpedition**

To learn more about Xpedition visit:  
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