

Making deal flow and investor relations more user friendly and flexible with Microsoft Dynamics 365

About the client

The client is a Swiss / European private equity firm supporting the transition to a sustainable future. It brings together energy leaders and professionals to accelerate growth in sustainable energy projects primarily in Europe.

It has over \$2 billion in assets under management and invests globally across venture, growth, credit, and infrastructure. The client has a team of over 60 professionals based in various locations in the USA, London and Germany.

The Challenge

Keeping on top of investor deals, contacts and throughput is critical to avoid missing out on potential investment opportunities. The client was using a combination of spreadsheets and the CRM functionality of an outdated system to run its investment portfolios and pipeline activity. But the level of communications and data that needed tracking was significant and its existing legacy system was no longer adequate.

There was a requirement for a flexible, user-friendly cloud

platform where all the information and knowledge would be readily available and easily actionable to enable its investment professionals to execute the right deals at the right time.

The client had anticipated high levels of deal making in the coming months and coupled with evolving client expectations, need to act fast to find a solution that would meet its complex challenges for this accelerated pace of business.

Highlights

Cloud transformation deploying Microsoft Dynamics 365 to achieve better flexibility and integration of investment management processes

Xpedition's Private Equity solution FS Xcelerator facilitates rapid project implementation in only 90 days

Tailored workshops with key personnel to help customise deal flow process

Easy-to-use and intuitive, with all key data accessible on a single platform

Solution

The firm decided on Xpedition's Private Equity solution "FS Xcelerator", underpinned with Microsoft Dynamics 365, with its advanced data and analytics capabilities. The flexibility, integration and ease of use with Microsoft cloud-based technology were key in the client choosing the Dynamics 365 solution.

Once the contract was signed, Xpedition mobilised its development teams to deliver the project at speed, successfully within 90 days. This speed of implementation was made possible with Xpedition's pre-built Private Equity CRM Accelerator which has been designed to be easily integrated and adopted.

Xpedition kicked off with data migration in phase one, followed by the Investor Relations piece and Deal Flow for the onboarding of deals. It ran workshops with key individuals in the organisation to refine how they needed the deal flow to work and to customise it with the right fields and terminology from the business.

The live system works well and is a successful implementation that serves the business needs. With all the information and knowledge in one place and accessible from a single platform that is easy-to-use and intuitive, the client is able to increase the throughput of deals and not miss out on future investment opportunities.

Benefits

- Supports all the deal making and investor relationship management activities to accelerate agility and ensure nothing is missed.
- Tracks and monitors all of the meetings, conversations and communications that take place with third parties and intermediaries building investor confidence and credibility.
- Stores all the historical, current and prospective deal making information in one place making it easier to identify opportunities, respond to challenges and close deals.
- Enables investment modelling across all its funds and tracks other parties who may be involved in the deal, which was previously not possible in the old system.



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