

Renewable energy company leverages investor engagement with Microsoft Dynamics 365

About the client

The client is a UK investment and asset management company investing in large-scale renewable energy projects, including solar, offshore and onshore wind.

The Challenge

Recent investment from a major US firm led the client to look at how it could modernise its technology landscape to grow its renewable energy investment platform.

The renewable energy company was looking to drive growth with an intelligent deal and investor client management system. It needed to put a CRM system in place, eliminating the reliance on manual processes and Excel spreadsheets and to provide information and reporting about its investors and deals.

A centralised CRM platform would provide control and visibility to all of the firm's investment activity, customer interactions and sales pipeline, as well as enable native integration with its existing Microsoft Office technology stack

In addition, there was also a requirement to improve deal flow transparency to drive deeper client engagement and optimise the ability to control, monitor and advance potential investor opportunities.

Highlights

Investment management processes optimised by deploying Xpedition's Private Equity solution FS Xcelerator, underpinned with Microsoft Dynamics 365

Integrated Deal Flow App gives data-driven insights and improves client information management

Specialised solution provides 360-degree view of data, automated workflows and AI-enabled forecasting

Platform facilitates high levels of collaboration and easy access to critical information

Solution

After looking at alternatives including market leader SalesForce, the client made the decision to deploy Xpedition's Private Equity solution FS Xcelerator, underpinned with Microsoft Dynamics 365. This specialised solution gives the client a 360-degree view and data insights of the customer journey, incorporating automated workflows and a more unified view of interactions with AI-enabled forecasting capabilities.

In a two-phased approach Xpedition prioritised Investor Relations to meet the client's criteria for speed and efficiency following the US investment. This also ensured users could embed and adopt the platform efficiently, before moving to phase two of the project for deal flow.

The Deal Flow App integration makes it much easier for the firm to gain data-driven insights and to effectively manage its client information, in order to control, monitor and drive deals faster through the investor pipeline.

Xpedition adopted its tailored, agile approach to project delivery, starting with the discovery phase following through to implementation, all within four

months. At present, 21 users are live on the platform and as the business grows, the number of users will increase.

The Microsoft Dynamics 365 platform provides the wider and more specific functionality that Xpedition's client needs to run its investment management business and to progress opportunities to close. Using the platform, the firm can deploy high levels of collaboration by accessing the right information at the right time to ensure no opportunities are missed.



Benefits

- Provides much more transparency to the client journey improving client relationships, ensuring data is not duplicated and that everyone is working on the same page
- Elevates forecasting and pipeline activity to the next level with its AI-enabled capability for revenue and client intelligence
- Automates business processes to reduce manual processes and use of Excel spreadsheets
- Makes insight-led decisions faster with data-driven processes and automated workflows

To learn more about Xpedition visit:

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