

User-led design. Data-driven investments.

Client story



Client

Investment services firm

Sector

Financial services and investment management

Project

CRM implementation/transforming the sales experience



Client challenge

As one of the world's premier fixed income investment managers, this firm is perceived as a leader by others in the investment management industry. However, our client understood that new CRM technologies would drive better data outcomes—allowing them to continue their mission of creating opportunities for investors everywhere. Achieving this meant taking a user-led approach: designing their systems to work more efficiently, consistently, and intuitively for their institutional and wealth management business line advisors. With a CRM system that could equip them with on-demand access to the latest financial data and insights, they could better service their clients and continue to shape the future of investment management.



Benefits to client

KPMG armed our client with a CRM engagement strategy grounded in customer needs and preferences, giving them a user-driven, consistent, and single view of their clients. Their company can now take advantage of:

- A unified system that is accessible from all platforms as a result of moving from an on-premise solution to a cloud-based solution
- Enhanced analytics and predictive functionality that enable more targeted client conversations and better budget planning for future years
- Enhanced business processes to capture data consistently across the firm, helping ensure that key business metrics can be automatically calculated
- A user experience that is simple and intuitive, enabling efficiencies in collaborating around client needs and producing advanced reporting and analytics
- A single, consistent framework of Key Performance Indicators (KPIs), information, and tools for reliable business intelligence.



KPMG response

Having the right client data is crucial to this firm's ability to provide thoughtful, intelligent, and critical investment recommendations to their customers. In the competitive asset management industry the right technology solutions (such as cloud) can mean greater efficiencies in how that data and information is gathered. That's why they turned to KPMG when they realized their need for advisory professionals who speak their language. KPMG's financial services acumen coupled with our technology experience enabled us to support the firm's desire to serve their clients better through innovation. Additionally, our client recognized the value of our alliance with Microsoft, and the added benefits the relationship could bring to their business.

Our client needed to rethink their global sales strategy and deploy a CRM application that could standardize and refine sales and service processes and KPIs. With their user experience needs in mind, KPMG and Microsoft began their collaboration.

Taking into account business enablement, total investment cost, and future sustainability, our client selected Microsoft Dynamics as their core CRM platform, allowing them to:

- Increase collaboration and information sharing among Client Services, Business Development, Product Management, and other departments
- Create visibility into the effectiveness of marketing activities, allowing for continuous optimization
- Increase transparency into client financial account portfolios, making information easily accessible.

Ultimately, we helped our client roll out a next-generation, holistic CRM solution with simplified mobility, advanced reporting analytics, and a unified user experience. Equipped with client data at their fingertips, they are now transforming the way people invest.

The result? By upgrading their CRM platform, our client's institutional and wealth management advisors benefited from easier access to the client data they needed—essentially enabling them to deliver better investment opportunities.



KPMG insights

Beyond the technology challenge is a greater business challenge.

Often, transformation isn't just a matter of plugging in a technology solution. It takes thoughtful examination into the client's business, formulating a holistic strategy, and then implementing technology that addresses the key business problem and enables the organization to succeed. Remaining technology agnostic allows us to make recommendations based on client needs, as opposed to force fitting a solution to work for a client.

People at the center of technology.

Solving a business problem means truly understanding user needs and desires. We believe that truly effective technology solutions are designed with the user in mind. Achieving that in itself takes close collaboration with our clients. The outcome is a technology investment that serves a purpose for our clients and their customers, rather than technology for the sake of touting features.

If you are experiencing similar issues or you would like to know more about this case study, please contact us.

Jesse Loscalzo
jloscalzo@kpmg.com
801-237-1295

Matt Ninnemann
mynnemann@kpmg.com
212-954-8303

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