

HITACHI
Inspire the Next

Civitas Capital Group CRM Success Story



Hitachi Solutions



CUSTOMER PROFILE

Civitas Capital Group is a family of specialty asset management and financial services companies with operating divisions focused on Alternative Investments, EB-5 Investments and Wealth Management. The firm provides a range of products and services for institutional investors, family offices and qualified individuals.

Civitas prides itself on the depth of its client relationships and the range of clients it serves. The company is particularly accomplished in serving international clients with complex needs and goals.

INDUSTRY:

Financial Services &
Asset Management

LOCATION:

Dallas, TX

Dynamics CRM Customer Story

Hitachi Solutions Helps Civitas Capital Group Migrate from Salesforce to Capitalize on the Power of Microsoft Dynamics CRM Online

Since its inception in 2010, Civitas Capital Group has expanded its operating divisions and enjoyed rapid growth. The company's multi-faceted business now encompasses:

▪ EB-5 Capital

Civitas sponsors private investment opportunities approved by the U.S. federal government to meet the requirements of the EB-5 Immigrant Investor Program. The company currently manages fifteen regional centers for EB-5 investment in major U.S. metro markets.

▪ Alternative Investments

Civitas Alternative Investments creates opportunities for investors to realize excellent risk adjusted returns. With strategies focused on real assets, its goal is to provide institutional and qualified investors boutique investment strategies to enhance diversification and alpha.

▪ Wealth Management

Civitas also serves its clients' financial planning and wealth management needs, in the U.S. and abroad, with a staff of bi-cultural professionals.

Although it had invested significant money and effort into deploying Salesforce – Civitas' needs outgrew the capabilities of its CRM solution. "Our business morphed, but our CRM solution did not," said Caitlin Rhodes, director of administration for Civitas Capital Group. "We realized that we needed to look for a more flexible solution that could evolve as quickly as we do."

Civitas was extremely thorough in its selection process. After a very careful evaluation process and four custom solution demonstrations, the company selected Hitachi Solutions as its trusted advisor to help implement a new Microsoft Dynamics CRM solution across its various business lines.

CHALLENGES

Civitas' business is heavily reliant on business compliance and meeting government regulations. As a result, processes and workflows, data integrity and reporting are critical to success.

“Hitachi Solutions understood the many nuances of our business. This was a critical element in leading us toward a successful CRM implementation. With Microsoft Dynamics CRM Online, we are now better positioned to continue to play a leading role in our industry.”

Caitlin Rhodes, Director of Corporate Administration

As the company expanded laterally, users began to utilize Salesforce differently. This created a piecemeal system, affecting the data quality and integrity. In addition, the unintuitive interface led to low user adoption. More importantly, the lack of flexible reporting in Salesforce did not allow key stakeholders to quickly view the leading indicators they needed to make informed decisions.

“Any CRM solution is only as good as its user adoption,” said Rhodes. “We were aware that we were not using Salesforce to its fullest potential. But, we also understood that there were some usability issues that would not be easy to overcome. Our biggest challenge is to get our people to trust the system.”

In addition, integration with Microsoft Outlook was imperative since the company’s user base tends to live in their email.

SOLUTION

“From the start, the Hitachi Solutions team was able to tell us what issues we needed to solve and then translate these into solution demonstrations,” added Rhodes. “The demonstrations of Microsoft Dynamics CRM flowed well and highlighted the ease of use.”

Together, Hitachi Solutions and Civitas implemented the new Microsoft Dynamics CRM Online system within a compressed timeline of four months.

Although the majority of Civitas staff is located in the Dallas office, the sales team travels all over the world. Therefore, having a cloud-based solution provides the needed flexibility and accessibility.

In addition, the company uses outside agents that require limited access. The role-based security in Microsoft Dynamics enables privileges that are relevant for each user to be easily assigned

BENEFITS

In the short amount of time since the solution went live, Civitas has already started to realize the rewards.

The ability to track a conversation in Outlook has already proved to be an invaluable tool.

Since the investor relations teams used the previous system more frequently, they were able to build the new system using their process flows. This allowed them to begin using it immediately, offer feedback and start capitalizing on the reporting features. The current, true data has proven to be the key to getting users on board.

Civitas manages hundreds of EB-5 investors who they could provide wealth management services to once the investors are granted permanent green cards. The new Microsoft CRM Online solution now provides the workflow automation to maintain a high level of quality interaction during the EB-5 approval process, creating potential upsell/cross sell opportunities for the company's Wealth Management Services.

As Civitas continues to grow its businesses, this new Microsoft Dynamics CRM solution will also allow them to quickly onboard both new employees and clients.

According to Rhodes, "We still have our training wheels on but I am confident that we have the tools in place that will allow us to easily roll into the future."

