

**PFM Case Study**





## Cloud CRM Customer Story

*Leading Financial and Investment Advisory Firm Improves Data Processes with Dynamics 365*

### CUSTOMER PROFILE

PFM opened its first office in Philadelphia in 1975. PFM understood the need for a financial services firm founded exclusively for the benefit of governments and charitable institution clients. Thanks to an unwavering commitment to serving clients' interests above all else, PFM has grown into one of the nation's leading independent financial and investment advisors.

Today, PFM employs hundreds of professionals serving a diverse base of clients from locations in every region of the country. From asset management to financial advisory and consulting, PFM employs professionals who work across a broad range of traditional and special purpose sectors.

### INDUSTRY

Financial Services

### LOCATION

United States

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### CHALLENGE

Founded in 1975, PFM offers superior financial advice, disciplined management and ingenuity to build, power, move and educate its clients. PFM specializes in financial advisory, consultancy, and asset management to offer advice and problem solving expertise to clients with a variety of needs. As the company continues to grow, PFM sought a powerful CRM system to improve data integrity, enhance mobility, and improve access to information.

Prior to Dynamics 365, PFM relied on an older system that wasn't capable of scaling with the business. The overly-customized system made it difficult for different groups within the company to collaborate and access data. In some cases data was difficult to update and became stale.

"Cleaning up the data was our number one priority," said David Jenkins, senior systems engineer at PFM. "This made it more useable and allowed people to trust it more. We were aiming to improve the quality and integrity of data and reduce the amount of data duplication with the upgrade."

Hitachi Solutions joined the PFM team as a partner and trusted advisor to upgrade the system from an on-premise solution to a modern cloud offering. The two teams worked together to move the system from ground to cloud and clean up the data in the process.





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Isai Amaya-Garcia  
Sr. Software Engineer  
PFM

## SOLUTION

The Hitachi Solutions and PFM teams worked together seamlessly to replace PFM’s legacy system with Dynamics 365. Hitachi Solutions’ expert consultants worked with PFM to become an extension of its team to ensure the system was up and running smoothly and efficiently.

“We were able to stay focused on the goals we wanted to accomplish,” said Isai Amaya-Garcia, systems engineer at PFM. “The Hitachi team brought tools and experience to help better implement our business processes.”

With Dynamics 365 (referred to internally as CORE), PFM practitioners can access information online in the cloud from any device. Different departments can now access information from other groups within the company that was previously inaccessible. By improving data quality and company-wide access to information, PFM is breaking down silos and moving closer to its vision of establishing a central client repository that provides a complete 360-degree view of its clients across the enterprise.

“Our previous systems didn’t have client information in on place, so we would have to go to a couple of different sources to get information on a client,” said Jenkins. “Now, we have the foundation for consolidating all client contact and project information in one place.”

PFM’s marketing department is also seeing the benefits of switching to Dynamics 365. Enhanced marketing capabilities include improvements to email campaigns and marketing analytics. The marketing team is better able to analyze campaigns and track emails with the detailed reports within Dynamics 365.

PFM continues to work with Hitachi Solutions to bring other areas of the business into the Dynamics 365 platform. New sales and marketing processes enable PFM to achieve greater collaboration among different departments to automate processes and provide the right information to the right people at the right time.

“All of the new features available to us through Dynamics 365 will help us to integrate with other in-house business systems and present the data from multiple sources in the way we want,” said Amaya-Garcia.



## WHY HITACHI SOLUTIONS?

Hitachi Solutions is one of the largest, most qualified and highly experienced Microsoft Dynamics consulting firms across the globe, capable of handling complex tier-one displacement projects. Our company's caliber of expertise and commitment to customers is evidenced through our consistent recognition from both Microsoft and industry analysts. Contact a Hitachi Solutions expert to discuss how our Microsoft Dynamics Solutions can help improve your productivity.

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## BENEFITS

### Improved Data Integrity

Data is easier to maintain within Dynamics 365. PFM's old system was cumbersome and difficult to update. With the deduplication and data cleanup that PFM received during the upgrade to Dynamics 365, data is more useable and is more widely trusted.

### Better Access to Information

Dynamics 365 is mobile-ready, and provides access to customer data from any device. The customer contact record can be updated or created on the fly, ensuring that everyone at PFM always has access to the most up-to-date information. Additionally, team members can analyze responses, leads, and campaign ROI with rich reporting.

### Enhanced Marketing Capabilities

Dynamics 365 provides PFM a marketing solution that enables the team to plan, execute, and measure campaigns across channels, from start to finish. Every touchpoint is seen as a marketing opportunity, and enhanced email functionality enables PFM to market more effectively, improve productivity, and gain actionable insight into marketing campaigns.