



Purpose-Built Relationship Management for the Financial Services Industry



Financial customer relationships are complex – from tracking opportunities and performance, to offer lifecycles and contract management.

We created Hitachi Solutions Engage for Asset Management as a single solution to track and manage every aspect of your asset management business within Microsoft Dynamics 365.

Hitachi Solutions tailored this solution specifically for management firms, retail fund wholesalers, institutional sales teams, and relationship managers, providing them with a comprehensive 360-degree view of crucial relationships among financial advisors, clients, consultants, custodians, and plan administrators. Your teams can identify, manage, and track relationships between clients, pensions, endowments,

foundations, defined contribution, sub-advisory, and financial intermediaries with a high level of detail in one place.

With this level of visibility, your firm gets a customer-centric and holistic view of your business, giving insights to:

- Better profile and segment key relationships
- Increase visibility into contract management enhancing engagement
- Gain real-time visibility of opportunity by stage to better manage the opportunity lifecycle
- Track and manage distribution lines, performance of dealers, brand offices, and individual reps
- Better manage pitch response and the RFP and RFI process



According to **Nucleus Research**, companies using industry-specific applications found they could get **70-80%** of their needs out of the box. Not only does this reduce time to go-live, but it also reduces initial consulting and customization costs by **40-60%**. That's why we've developed Engage for Asset Management. Born from decades of experience and hundreds of implementations, Hitachi Solutions takes the reliability and ingenuity of the Microsoft Dynamics 365 platform and amplifies it with pre-built, out-of-the-box functionality specifically for financial services industries.

Hitachi Solutions offers deep industry expertise combined with decades of experience providing high-value solutions that deliver rapid return on investment. [Contact Hitachi Solutions](#) to learn more about Engage for Asset Management.



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