

Enhancing Investment Management for Pension Plan



A prominent investment management firm faced significant challenges in managing their relationships and deal flows across various asset classes. The lack of a standardized process and visibility into these relationships hindered operational efficiency. To address these issues, the firm's leadership partnered with Hitachi Solutions to implement a comprehensive CRM solution tailored to their needs.

Specifications

Industry:

- Financial Services

Drivers:

- Enhance relationship and deal management, standardize processes

Project Type:

- CRM Implementation and Modernization

Products:

- Microsoft Dynamics 365 Sales, Hitachi Solutions Engage for Private Equity, Hitachi Solutions Docudrop

Challenge

In the financial sector, effective relationship management and streamlined operations are crucial for success. The investment management firm struggled with non-standardized business processes across investment teams, manual pipeline reporting, and siloed data management. These inefficiencies resulted in time-consuming tasks and a lack of visibility into relationships with external partners such as brokers and service providers. The firm needed a robust solution that could consolidate essential business contacts and automate deal management processes.

Solution

Hitachi Solutions implemented a comprehensive suite of tools, including Microsoft Dynamics 365 Sales, Hitachi Solutions [DocuDrop](#), an AI-driven application that automates CRM data entry from digital documents with unprecedented efficiency, as well as Hitachi Solutions [Engage for Private Equity](#), which adds added features and functionality to Microsoft Dynamics 365 specifically catered to the financial services industry. These solutions provided the firm with the ability to directly address their operational challenges and enhance their investment management capabilities.

1. Standardize Business Processes:

This proved to be the foundation of a trusted partnership. Hitachi Solutions was able solve a critical business process chokepoint that required technical innovation and careful collaboration and communication with key stakeholders to remedy, adapt to the overall change and adopt the new process. This extra care and consideration for improvement solidified the partnership. Hitachi Solutions continues to iterate with the Schneider Downs team to innovate and make improvements on the Dynamics side as the company scales into the cloud.

2. Comprehensive Relationship Management:

Dynamics 365, augmented with Engage for Private Equity, offered the firm complete visibility into their relationships and deal flows. This integration improved communication and collaboration by breaking down silos between investment groups, allowing for more strategic management of interactions and better alignment with the firm's investment objectives.

3. Improved Data Security and Access:

The implemented solution ensured robust data security with encryption and audit capabilities, addressing the firm's requirement for securing sensitive information. Additionally, mobile access to real-time data empowered employees to make timely and informed decisions, further enhancing productivity and strategic responsiveness.

Driven by the need to significantly streamline their data entry and management processes, the firm implemented Hitachi Solutions DocuDrop and Engage for Private Equity. They chose DocuDrop for its promise to reduce data entry time by up to 90%, allowing them to redirect resources toward higher-value tasks. Hitachi Solutions DocuDrop revolutionized the firm's approach to data management by transforming traditionally complex and time-consuming data entry into a simple drag-and-drop process. Key outcomes include:



AI-Powered Automation: Installed within the customer's Azure tenant, DocuDrop uses advanced AI to automatically extract and integrate data into Dynamics 365, ensuring efficient data handling.



Enhanced Accuracy and Security: By keeping all data within the firm's tenant, DocuDrop provides unparalleled security and improved data accuracy.

Standardizing and enhancing deal management processes was crucial for the firm to overcome inefficiencies and data silos that hampered their operational effectiveness. By establishing a unified platform for deal management, the firm aimed to facilitate better collaboration among investment teams, ensure consistent processes, and improve visibility into their investment pipelines. This transformation was vital to maximize operational efficiency and enable more informed decision-making, ultimately providing better outcomes and competitive advantage in the financial services sector.

By implementing Engage for Private Equity IP the firm realized the benefits of:

- 360-degree visibility into their relationships, allowing identification of key stakeholders and influencers.

- Improved operational efficiency with collaborative tools that facilitate deal sourcing, management, and bid tracking.
- Maintained confidentiality with a robust security model that supports discretion in deal data sharing.

Benefits

The partnership with Hitachi Solutions resulted in transformative benefits for the investment management firm:

- **Operational Efficiency:**
 - Streamlined decision-making through automated processes and real-time data access.
 - Enhanced collaboration between investment teams, improving service delivery.
- **Improved Relationship Management:**
 - Consolidated essential business contacts across various groups for efficient management.
 - Enabled faster deal closures through better visibility and communication.
- **Advanced Data Insights:**
 - Leveraged AI-driven insights with DocuDrop for better decision-making and data ingestion.

Contact us to learn how we can help you!



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