Hitachi Solutions

Microsoft

Transforming the Client Experience with AI and Automation

Discover the Powerful Combination of Microsoft Dynamics 365 and Microsoft Sales Copilot

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Introduction

In today's fast-paced digital age, there's nothing more important than a personalized client experience, which can be especially tricky in the capital markets sector where it is common to manage B2B2B, B2B2C, and third-party influencer relationships for a given transaction or fund distribution model.

The good news is that advanced cloud technologies — such as Microsoft Dynamics 365 and Sales Copilot — are supporting the innovation and automation that's transforming the client experience. By simplifying a complex set of relationships, these cloud technologies are increasing efficiencies and accelerating business growth.

This guide will focus on the common challenges within capital markets and how AI and Microsoft's automation tools can help.

Microsoft Dynamics 365, a cloud-based solution CRM platform spanning marketing, sales, and service, works seamlessly and effectively to connect your financial services enterprise. Microsoft Sales Copilot is an application that integrates with Microsoft 365 and Microsoft Teams to help automate, simplify, and optimize sales processes to capture, access, and register data automatically. The application, which connects directly to the enterprise, also enables generative AI to create content based on client interactions.

Ensuring Alignment & Suitability

With so many options in the market, finding alignment between an investor's objectives and the investments made by pooled funds is key. Funds will describe the types of investments mandated; as funds look to raise more money from outside investors, they will look to match the objectives of potential investors to the objectives of the fund.

As an example - if you work in private equity and/or if your focus is telecommunications, you need data to ensure that investors and strategic buyers are looking to invest in companies within your industries and target range.

And as we dive a little deeper, this means we will want to have a look at what their tendencies have been in the past relative to indication ranges and sector preferences and synthesize this against the backdrop of the current market conditions, which are inclusive of recent transaction comparables, deal structures, and changing regulation, as well as returns and expected valuations.

Using Microsoft Dynamics 365 to manage your relationships and deals will help provide insights and analytics to match deals with strategic investors and provide context to your partners' strategic preferences.

Managing the Complexities of the Deal Cycle

The deal cycle in the capital markets space is both complicated and challenging. Firms are expected to operate quickly and efficiently while simultaneously managing a variety of both internal and external relationships. These include partnerships within a firm and with third parties such as intermediaries, buyers, sellers, partners, syndicates, agents, advisors and so on. It's also more than just complex relationships; we're talking about elaborate deal structures within a continuously evolving financial landscape.

Our solutions, knowledge base, and support are all built upon the seamless connectivity and data-driven technology of the Microsoft platform, which provides enhanced financial visibility and profitability with real-time reporting and valuable client insights.

For example, Hitachi Solutions Engage for Private Equity helps improve intelligence and efficiency throughout the investment lifecycle with technology that enables you to identify and manage important business relationships and make better decisions by delivering up-to-the-minute insights.

Additionally, Engage for Asset Management, is designed to meet the needs of asset management firms, retail fund wholesalers, institutional sales teams, and relationship managers by providing a 360-degree view of your key relationships. This particular solution centers on the importance of relationship management. You can identify, manage, and track relationships with retail and institutional clients, including pensions, endowments, foundations, and more.

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Controlling Deal Conflicts

There are a lot of moving pieces in a corporate investment — regulations, compliance, clearances, and background checks, to name a few. And many of these components, such as regulatory compliance, are constantly evolving. All of these pieces amount to complex reporting structures, which require data and information to be formatted in a particular way, entered into specific systems, and shared with certain individuals or parties for proper approvals. These challenges are present across all stages -- for instance during initial stages, e.g., deal conflict clearances but also during middle and late-stage cycles -- often saddling deal managers with heavier than necessary administration workloads and in many cases hindering deal progression.

Digital assistance capabilities support not only required workflow capabilities for required business processes, but these capabilities may also now be leveraged to help and support the actual decisioning that is needed along the way. This keeps processes moving and surfacing exceptions and approval alerts appropriately. The result is less time on internal administration and optimizing time spent on deals and managing constituents.

D365 offers robust security capabilities, as well as integration with Azure AD and productivity tools, making management of rights and teams/roles simpler to manage.

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Enhancing Daily Productivity

Artificial intelligence can provide meaningful value when it comes to managing daily productivity. For example, the technology behind Dynamics 365 and Sales Copilot makes it easy to capture conversations and meeting summary reports and compile relevant information in a specific format. Since many complex deal structures often come with comprehensive notes, AI technology can help extract insights and summarize information in an easily digestible and accessible format.

As a comprehensive sales enablement platform, Sales Copilot centralizes client data and streamlines sales processes, enabling teams to access insights, track interactions, and manage leads in one place, all of which saves valuable time. Copilot allows for email thread summarization, and GPT-produced email drafts that leverage contextual information about the recipient, including context from the email thread and information from Dynamics 365. Additionally, Copilot in Teams provides voice transcription and sentiment analysis of recorded calls, as well as auto tagging of people, dates, action items, products, competitors, etc.

AI can also provide suggestions on scheduling potential meetings based on historical calendar data — similar to product recommendations you may receive from online retailers based on previous shopping experiences.

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Solving Workflow & Automation Challenges

In today's fast-paced financial world, time is especially valuable, which means automation and efficient workflows are more important than ever. Artificial intelligence and D365 solve many of the challenges you may face around workflows and automation, such as establishing rules-based alerts streamlining, creating a more efficient onboarding process, setting up a new account, managing risk evaluation, and handling account closures and modifications.

D365 allows for great flexibility, including the ability to manage processes using point-and-click tools with standard connectors (via Power Automate) to Microsoft and external tools. This enables organizations to standardize, automate, and streamline processes while providing the long-term ability to adapt and adjust and maintain visibility, all of which is important for regulated businesses.

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Providing Personalized Client Service Experiences

A truly proactive and personalized client experience is not only key — it's a must-have. Offering this type of above-and-beyond service to your clients reaps numerous benefits, including enhanced satisfaction and increased client retention and loyalty. Plus, it's a way for you to differentiate yourself in today's highly competitive market.

A personalized client experience is especially important in private equity where limited partners making an investment into a PE fund can be different types of entities. For example, a key contact for relationship management could represent a pension fund, endowment or foundation, a high-net worth individual, a family office, or a corporation. Private equity firms often want an easy way to track and manage relationships, communication, and reporting across potential target acquisitions during the course of a deal and across a portfolio of holding companies post-deal. Configuring the CRM platform in a way that accounts for these complexities is fundamental to enabling a personalized client experience, from early introductions through ongoing partnership.

Collaboration with third parties, such as advisors and consultants, and with multiple affiliates within a given firm, is also important. For example, in asset management, institutional investors, broker-dealers, and third-party advisors are all key clients. Ensuring team members across the asset management firm are current on recent discussions and client priorities is an important part of enabling an impressive client experience. When it comes to AI, GenAI can be helpful for synthesizing large data sets to provide answers and perspective to key constituents in a timely fashion.

The best way to provide a personalized experience is through a strong sales and marketing connection alongside a single 360-degree view of the client. With Dynamics 365, you can collect and access data from every system in one centralized location, including phone, social media, chat, text, email, CRM, and more, allowing you to create a profile of your client's desires, interests, behaviors, and goals. All of this enhances the client experience while driving efficiency and deal velocity.

In terms of AI, a common use is predicting client actions and needs, which allows you to create personalized messaging, advice, or recommendations in a timely way. Also, AI chatbots and virtual assistants can provide instant client support with the ability to answer inquiries and assist with next-best actions, product advice, and recommendations.

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Enhanced Portfolio Management and Post-Deal Monitoring

Artificial intelligence and data science technologies are extremely valuable when it comes to identifying anomalies and understanding impacts to performance. In asset management, portfolio managers have at-risk portfolios that they need to keep close tabs on and take proactive measures to rebalance, which is a quantitative exercise that requires strategic decision-making to get back on track.

The same is true for those in private equity deals who need to sort out financials, manage workforce changes, or figure out how to get companies back on track, all of which require constant monitoring. Dynamics 365 enables you to quickly access information and analytics in order to assess the health of your business and improve financial controls so that you can make decisions in your best interest.

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Power Your Client Experiences With Microsoft Dynamics & Sales Copilot

Transform client experiences in the capital markets landscape with modern solutions that drive growth & efficiency

Hitachi Solutions and Microsoft have the industry expertise and modern solutions that capital markets firms require to meet emerging and dynamic business needs, be more competitive, profitable, and responsive.

Our expert advisors are ready to provide a free assessment that will help you identify any gaps in current sales processes and reporting and support you in creating opportunities to streamline workflows and automate manual tasks. We'll leverage our "invisible CRM" approach to support you in prioritizing relationship-building and transform your sales team with an integrated CRM system designed specifically for your workflows.

Get the Offer

About Hitachi Solutions

With Hitachi Solutions as your guide, we can accelerate your journey to do more with less while ensuring quality, security, and connectivity. As a strategic Microsoft partner for nearly 20 years, we bring deep financial services industry and technology experience to your digital journey and any modernization initiative. We're also experts at helping you get the most benefit and value from all your Microsoft investments. We invite you to contact us with any questions or to learn more about how our revolutionary technology can help move your business in the right direction.

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