

Case study

The power of making it your own



A wealth management services company that delivers personalized services had the need to standardize, simplify processes, drive efficiencies, expose more data, and increase visibility and interoperability to their users.

After evaluating solutions, the company decided to build a modern, completely customized, cloud-based customer engagement platform on Microsoft Dynamics 365.

The off-the-shelf functionalities gave the ability for the users to achieve a single view of the customer lifecycle across all products. Through customizations and further extensibility of the solution, the company added special wealth management services and fully customized the user experience to better serve their customers.

This helped the company streamline processes, increase revenue, reduce costs, enhance transparency, and manage regulatory compliance, and allowed the users to better understand each customer's story, goals, and capacity for risk. The company was able to deliver appropriate, innovative, high-value services and products to maintain successful end-to-end customer journeys across every account.

The power of using off-the-shelf functionalities and being able to further customize and extend the experience for their users set the foundation to improve their internal processes and empowered their users to deliver better services in a more efficient matter.