



Microsoft Dynamics Customer Solution Case Study



Customer: HgCapital

Web Site: www.hgcapital.com

Customer Size: 1–99

Country or Region: United Kingdom, Germany, and the Netherlands

Industry: Financial Services

Partner: Aspective

Customer Profile

HgCapital is a private equity firm in the financial services market. Present in the United Kingdom, Germany, and the Netherlands, it has 77 employees.

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics CRM
- Microsoft Office
 - Microsoft Office 2003 Editions
 - Microsoft Office Outlook 2003
- Microsoft Server Product Portfolio
 - Microsoft Exchange Server 2003
 - Microsoft SQL Server 2005

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www.microsoft.com/resources/casestudies

aspective
a Vodafone company

European Finance Employees Build Stronger Business Relationships with Management Tool

“Now we can track data and information in a much more detailed and cohesive manner. The information relating to our key contacts and prospective deals is pulled directly from Microsoft Dynamics CRM and provides something more concrete for us to build our business relationships on.”

Steven Batchelor, Associate Director, HgCapital

Established in 1990, HgCapital is a private equity firm with offices in the United Kingdom, Germany, and the Netherlands. HgCapital aims to generate high risk-adjusted returns for its investors by acquiring attractive business assets, and working with management to generate incremental value. When its existing customer relationship management (CRM) system made it difficult to manage the firm’s contact database, oversee key relationships, and track prospective deals efficiently, HgCapital implemented Microsoft Dynamics CRM. Now, employees can monitor and analyze relationships with all their relevant business contacts and reduce time spent on administrative duties.

Business Needs

HgCapital wanted to improve the way it interacted with its external contacts and monitored prospective deals. This required its 77 employees to gain better access to quality information—whether they were on the road or in the office. Steven Batchelor,

Associate Director, HgCapital says: “We have a range of critical relationships such as intermediaries—firms who introduce us to deals or the management teams in the companies we currently own or look to acquire.”

When it came to sourcing information,



employees often had to search through a number of different applications before they found the information they were looking for. In turn, inputting data into multiple sources was time consuming. Batchelor says: “Our employees were restricted by the limited automation provided by Access, our contact database system. As a result, it was not being used to full capacity.”

Employees needed mobile access to CRM contact information, but the existing system didn't have this flexibility. This was particularly important for the investment teams, which spend a significant amount of time out of the office—visiting industry contacts, intermediaries, and companies. Employees needed a solution that promoted mobility, as well as executing three main functions—content management, analysis of intermediary relationships, and deal-flow monitoring.

Batchelor says: “We wanted a customer relationship management system that integrated with Microsoft Office Outlook® 2003, a tool our employees were already familiar with, and offered greater customization possibilities to fit our needs as a leading mid-market private equity firm.”

Solution

The client services and IT teams spent six months researching various CRM solutions. These included Salesforce, ACT, and Goldmine. But when they met Microsoft Gold Certified Partner Aspective, they knew it could provide the tailored solution they needed with Microsoft Dynamics CRM.

Greg Cook, IT Technical Lead, HgCapital, says: “Aspective was easy to work with throughout the entire project. Its consultants were very knowledgeable and assisted us with addressing key integration needs.”

IT and client services employees worked closely with Aspective to design and build a Microsoft Dynamics CRM environment. The solution was launched in April 2007 in conjunction with Microsoft Dynamics CRM Mobile, which gives employees access to the contact information they need when away from the office.

The other technologies that integrate with the solution are:

- Microsoft SQL Server™ 2005—provides the store for customer data.
- Microsoft Office 2003 Editions—tool used to input and present data.
- Microsoft Office Outlook 2003—used for e-mail, meeting, and calendar management.
- Microsoft Exchange Server 2003—runs the e-mail system.

Before going live, a few employees from the client services, portfolio management, and investment teams participated in a pilot program. During the pilot, Aspective incorporated user feedback into the final solution. This ensured that when the system went live employees had great confidence in Microsoft Dynamics CRM.

Employees can monitor e-mail, meetings, and deals more effectively, without having to search through multiple systems, now that they work on a centralized basis. Batchelor says: “Now we can track data and information in a much more detailed and cohesive manner. The information relating to our key contacts and prospective deals is pulled directly from Microsoft Dynamics CRM and provides something more concrete for us to build our business relationships on.”

Benefits

Since deploying Microsoft Dynamics CRM, employees at HgCapital have tools that help

them communicate better, and have a better view of how their deal flow is progressing. Before, individual investment teams tracked deal flow using Microsoft Office Word or Microsoft Office Excel® documents.

Now the centralized system makes it more efficient and faster to analyze data. Also, employees now have the ability to access contacts while on the move. Batchelor says: “Employee feedback is positive and user acceptance is more than 90 percent. What's more, our teams have reduced their time spent on administrative tasks. Personally, I'm saving five hours a month. Microsoft Dynamics CRM has been easy for our people to dive into and use, thanks to its excellent integration with Microsoft Office Outlook. ”

- Employee feedback was incorporated during the pilot program to provide a customized solution.
- Employees working in remote locations can access contact information while they're on the move, helping them remain productive away from the office.
- Integration with the familiar Office Outlook interface has helped boost employee acceptance, which is now more than 90 percent.
- Business relationships at HgCapital have improved due to better communication tools such as personalized e-mail.
- The company can integrate Microsoft Dynamics CRM easily with other company applications, so employees can save time by using one interface for multiple systems.