



PowerObjects and Dynamics 365: Transforming Capital Market Organizations

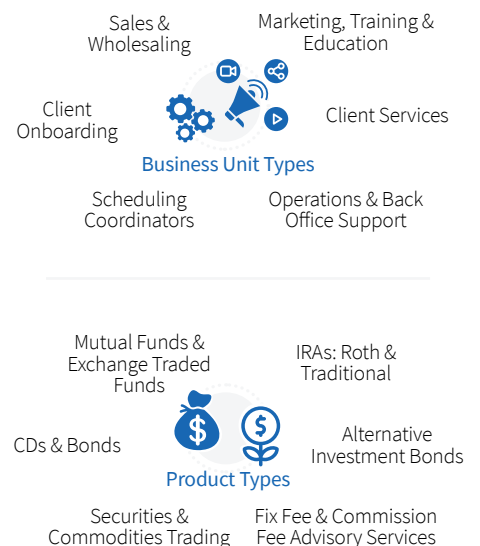
PowerObjects offers a scalable and customizable Capital Markets solution that leverages Microsoft Dynamics 365 and the full suite of related Microsoft Business Applications.

The Capital Markets industry is evolving before our eyes. New and deeply complex product types are emerging with tighter margins and cost controls. The focus on consumer protection has never been more intense, with volumes of regulatory and compliance guidelines that govern every interaction.

With so many external factors that Capital Markets organizations *can't* control, it's critical to seize the opportunities they can. For instance, providing a consistently superior level of customer experience to clients, partners, channels, and relationships can be a significant differentiator in the industry.

PowerObjects offers a Capital Markets solution designed to empower organizations to deliver that consistently superior customer experience. It leverages Microsoft Dynamics 365, related Microsoft Business Applications, and our proprietary data modeling tool.

Persona Driven Customer Experience



KEY BENEFITS OF A POWEROBJECTS SOLUTION:

- 360° view of customer data equips frontline employees with information needed to deliver optimized customer experiences
- Enables contact centers to handle more interactions and anticipate customer needs
- Delivers better visibility into the sales pipeline
- Reduces operational costs and onboarding time across all branches and departments

AVAILABLE WORKLOADS AND ENHANCEMENTS FOR CAPITAL MARKETS:

- Dynamics 365 for Customer Service (Omni-Channel)
- Dynamics 365 for Sales
- Dynamics 365 for Marketing
- Advanced Analytics – Power BI
- AI, Machine Learning, Bots
- Microsoft PowerApps and Flow



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KEY CAPITAL MARKETS CAPABILITIES:

The robust Capital Markets data modeling tool from PowerObjects is based on 18 fully developed personas and Capital Markets organizational types. It works by dictating – based on persona selected – which fields, forms, views, and tools from the Microsoft Business Applications stack are needed for success.

Each persona drills deeply into the different iterations. Selecting the Onboarding persona, for example, provides options for Employee, Customer, Account, and Investor. Within Investor, the model provides process subtypes for New Account Setup, Documents IGO/NIGO, System Setups, and Notifications. It then maps out the entire Microsoft-based technology infrastructure using the model. Benefits include:

- Service agents can anticipate customer needs by having a complete understanding of customer account information, interaction details, preferences, and history – all in one platform.
- Real-time customer information allows financial advisors to easily build lasting customer relationships and deliver tailored advice and accurate service.
- Asset Managers are equipped with enriched data showing investment portfolios and recent transactions for real-time client advice and cross-sell/up-sell opportunities.
- Ability to boost client loyalty and renewal rates with efficient inquiry handling and proactive customer service.
- Add value and build long-term relationships having Next Best Action suggestions and Know-Your-Customer profiles.
- Organizations can cut operational costs by minimizing administrative tasks with an intuitive interface.
- Advisers can send targeted offers to each customer based on their individual profiles, risk tolerance, and needs.

WHY POWEROBJECTS?

We leverage Microsoft Dynamics 365 and the Microsoft cloud to drive intelligent business value to our Capital Markets clients. Our approach is to find the best collection of Microsoft tools – Dynamics 365, Power BI, PowerApps, Flow, Azure, Office 365 – to craft the ideal client solution. PowerObjects is committed to delivery of global thought leadership in the Capital Markets space and we bring a laser focus on support and education to every engagement.