



POWERCAPITAL

Dynamics 365 Accelerator for Capital Markets from PowerObjects

As the Capital Markets industry continues to shift, we are seeing new compliance and regulations, as well as new products that are significantly more complex. With lower margins and tighter cost controls significantly impacting the channel, organizations must be more focused than ever before on delivering a better customer experience.

Excellent client service has become the baseline. Being able to deliver is no longer a positive differentiator in the traditional sense. Instead, **not** delivering consistently is now a **negative** differentiator that drives clients to other firms.

PowerCapital – PowerObjects’ Dynamics 365 Accelerator for the Capital Markets industry – leverages Microsoft Business Applications, our own PowerPack add-ons, and our proprietary data model to empower organizations to deliver consistently superior customer experiences.



WHY POWERCAPITAL?

Built on Microsoft Dynamics 365, PowerCapital is a custom solution designed by Capital Markets experts based on years of experience within the industry. PowerCapital accelerates CRM implementations by leveraging the Microsoft technology stack: Dynamics 365, LinkedIn, Azure, Power Platform, AI, Machine Learning, Microsoft One Common Data Layer, and the innovative Microsoft Cloud Platform.

Our very own suite of PowerPack add-ons also offer enhanced capabilities and user experiences, such as integrated telephony, dynamic surveying, and marketing campaign automation. These tools were built to strengthen and expand the capabilities of Dynamics 365 and they are already incorporated in the PowerCapital accelerator.

PowerCapital enables Capital Markets firms to truly accelerate time to market, mitigate deployment risk, reduce program costs, increase user adoption, and streamline user experience and customer interactions. Based on nine fully developed Capital Markets user personas, the model drives the navigation, forms, and views needed for each user interface across an organization. The available personas include:

- Asset Manager: Institutional
- Asset Manager: Retail
- Asset Manager: Channel
- Manager Broker Dealer
- Registered Investment Advisor
- Wealth Advisor
- Institution
- Global Consultant
- Financial Institution



KEY BENEFITS OF POWERCAPITAL

- Helps organizations leverage a unified 360-degree view of their customer experience to enable new insights and deliver differentiated customer interactions.
- Provides Asset Managers with enriched data showing investment portfolios and recent transactions for real-time client advice and cross-sell/upsell opportunities.
- Advisers can send targeted offers to each customer based on their individual profiles, risk tolerance, and needs.
- Next Best Action suggestions and Know-Your-Customer profiles help build value-add and longstanding relationships.
- Organizations can cut costs by minimizing administrative tasks with an intuitive interface.
- Reduces operational costs and onboarding time across all areas of the business.

WHY POWEROBJECTS?

- We are 100% focused on Microsoft Business Applications.
- Our FSI practice was named the 2019 Global Microsoft Financial Services Partner of the Year.
- Our Customer Service practice was named the 2019 Global Dynamics 365 Partner of the Year.
- We have extensive Capital Markets experience, actively working with several large global banks.
- Our Capital Markets acumen is unmatched in the Microsoft Partner ecosystem. We know the industry, the language, and the unique challenges. We've seen them and we've solved them.
- Our four pillars of Service, Support, Education, and Add-ons ensure end-to-end project success every time.