



## Envision what your future in Financial Services looks Like

**Our experts are here to help you solve key challenges such as:**

- Delivering a modern, holistic client experience
- Breaking down data silos to unlock a single source of truth
- Leveraging data for improved forecasting and decision making
- Streamlining the KYC & on-boarding experience
- Maximising the value of relationships
- Meeting the latest regulatory requirements

### **Empowering Financial Services Firms**

The financial services landscape is changing rapidly. Today's leading firms are agile, able to pivot quickly to fend off the challenge from digital disruptors. They know how to leverage data to gain key insights, deliver a holistic, digital client experience, bring sales and marketing closer together, and meet the demands of a complex regulatory environment.

*In this new reality, how do you envision the future state of your organisation? Build your transformation strategy with Microsoft Catalyst, a proven and powerful approach to innovation.*

### **Let's ideate together**

As part of Catalyst, meet with our experts and run an envisioning workshop, where we can ideate together using design led thinking concepts and jointly define how to enable the digital transformation of your organisation.

This one-day briefing starts with a review of your business objectives, followed by mutual discovery and visualisation of solutions, ending with a clear, actionable picture of how we can help you reach your business goals.

### **How Xpedition can help**

With 20 years as a Microsoft Gold Partner and more than 630 successful Dynamics 365 projects delivered, Xpedition has extensive experience in the Financial Services sector helping organisations on their path to growth.

# What is Microsoft Catalyst?

Build, plan, and execute business transformation strategies with a proven, innovative approach from Microsoft Catalyst—an envisioning and planning program that employs Microsoft Dynamics 365, the Microsoft Power Platform, and the Microsoft Cloud. Your business transformation starts with an I.D.E.A.

Start by finding the transformation strategy that's right for you. Define and prioritise your strategy using development activities, then foster ideation and drive decision making with an envisioning workshop.



## Inspire

Imagine a future state solution for your business

## Design

Discover what's possible by aligning technology investments to business goals

## Empower

Empower others in your organisation to see the value

## Achieve

Achieve business outcomes and improved customer experiences

➤ Envisioning Workshop

➤ Business Value & Solution Assessment

➤ Solution Demonstration

➤ Transformation Plan

For more information visit: <https://dynamics.microsoft.com/en-us/microsoft-catalyst/>

# Xpedition FS Xcelerator

Built on Microsoft Dynamics 365 and the Power Platform, the Xpedition FS Xcelerator empowers users thanks to a unique suite of apps that deliver growth and drive a modern, digital client experience. By leveraging a holistic, 360-degree view of critical client and account data, firms can maximise client value through the use of intelligent business applications. Key features include relationship intelligence, pipeline management, KYC and onboarding, regulatory compliance and audit trail functionality, broker management, and digital marketing & communications and events management.

**Get Started**

Request an envisioning workshop today!

[www.xpedition.co.uk/contact-us](http://www.xpedition.co.uk/contact-us)

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