Xpedition

FS Xcelerator

An innovative suite of apps designed to meet the challenges faced by financial services firms

Relationship Management

FS Xcelerator

KYC & On-Boarding	**Client Services**	**Fundraising**	**Broker Mgt**	**Event Mgt**
	DealFlow	**PowerBI Packs**	**Investor Relations**	**Briefing App**

Microsoft | Dynamics 365 Enterprise

Sales	Marketing	Customer Service	Customer Insights

Power BI
Application development

Power Apps
Business analytics

Power Automate
Process automation

Power Virtual Agent
Intelligent virtual agents

Combined with Xpedition's extensive financial services experience, the FS Xcelerator is the result of detailed client feedback and comprehensive industry research that together, has highlighted the need for innovative business solutions that help tackle the challenges firms face today.

The FS Xcelerator suite of apps leverages the power of Microsoft Dynamics 365 and the Power Platform, further enhancing their core capabilities to meet the exacting requirements of the financial services industry.

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FS Xcelerator Apps

KYC and On-Boarding App

Meet the latest KYC requirements and streamline the client experience

- Can be fully tailored for your firm
- Ability to provision a self-service client portal
- Supports document management and digital signatures
- Integrates with third-party screening services

Briefing App

Increase efficiencies and power more productive meetings

- Automated, pro-active alert, summary and Briefing Note
- Collates information from multiple sources
- Provides detailed summary in an easily digestible format
- Multiple templates can be used for different meetings
- Mobile device-friendly

Dealflow App

Effectively control, monitor and advance deals through the investment pipeline

- Target and track potential investments
- Structured deal flows with multiple steps, including conditional and gated stages
- Origination analysis and fee tracking
- Track internal and external teams and stakeholders

Fundraising App

Easily track, nurture and progress fundraising targets

- Structured approach to potential investment, from interest to commitment
- Placement tracking, and fund or co-invest processes
- Full analysis of potential investors and pipeline
- Fund tracking including committed investor vehicles

Investor Relations App

Gain key relationship insights and ensure effective communication

- Relationship management, tailored to investment scenarios
- View investor involvement across multiple funds and fund-raising activities
- Track all activity and identify relationship strengths and weaknesses
- Track portfolio talent
- Integrates with Outlook and LinkedIn Sales Navigator

FS Xcelerator Apps

Broker Management App

Gain deeper insights into your broker network

- Surface data on broker performance, KPIs and key stats
- Accreditation, compliance, and product portfolio tracking
- Case management for broker support
- Sales referrals and channel sales

Client Services App

Meet today's client expectations

- Complete client services solution
- Omni-channel communication
- Self-service client portal for logging & viewing cases
- Guided case process flows
- Automated responses and updates

Microsoft Power BI Packs

Leverage your data to gain valuable insights and clarity

- Standardised Power BI reports
- Reports can be scheduled for delivery at a time of your choosing
- All reports and dashboards tailored to your firm's requirements

Event Management App

Make every event a success with end-to-end event management

- Covers virtual, in-person or hybrid events
- Invitation, registration and waiting list, plus 'walk-in' registrations
- Integration with various email, event and webinar platforms
- Post-event survey via Customer Voice to gather valuable feedback

To find out more about the Financial Services Xcelerator, please contact Xpedition.

To learn more about Xpedition, visit:
xpedition.co.uk

Or contact us on
+44 (0)20 7121 4705   info@xpedition.co.uk

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