



Investment & Wealth Management

Develop a centralized “information hub” to make strategic, analytical decisions



Inadequate or outdated systems that don't integrate with existing applications or deliver critical client information quickly and accurately results in operational inefficiencies, missed sales opportunities, and a lack of alignment between sales and prospects or managers and clients. Investment management firms require solutions that enable them to:

“Know My Customer”

- Centralize client information to improve service levels.
- Ensure that the client's objectives are aligned with the right products and internal resources.
- Consolidate investment views from various outside sources to streamline fund mailings.

“Operate My Business”

- Define standard workflows to quickly onboard new clients, define new investment products, and facilitate referral routing
- Streamline audit process, ensure compliance with SEC regulations, and improve employee productivity

“Grow My Business”

- Leverage reports to learn more about the products clients are currently invested in to facilitate cross sell and up sell opportunities.
- Analyze information to identify and capture new market opportunities.

Challenge:

In response to the dramatic increase in regulatory reporting requirements, investment management firms are required to process and manage a high volume of critical information. Additionally, firms are facing new client demands and competitive challenges.

To facilitate compliance with regulatory requirements, deliver personalized services and advice, and capitalize on new opportunities, firms are looking for technology solutions that will help them manage complex client relationships in concert with business

About Us

Green Beacon Solutions partners with clients to implement integrated financial, supply chain, sales automation, and marketing business solutions built on proven Microsoft technologies. Our unique combination of technology, people, and process quickly help identify and implement expert strategies that support our client's business objectives within the distribution, professional services, banking/banking services, and manufacturing industries.

Why Green Beacon?

Our technology and consulting expertise, combined with our success in solving customer issues, have resulted in our unmatched industry reputation. We have an outstanding track record developing, delivering, and integrating ERP, CRM BI and Marketing Automation technology solutions that deliver direct business benefits for our customers.

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processes. Investment and Portfolio Management teams require a single system that integrates easily with existing applications, provides a 360-degree view of clients, and offers flexible marketing, sales, and customer services tools that can meet industry-specific regulatory and business process requirements.

Solution:

Existing transactional systems are ideal for managing and monitoring customer accounts and portfolios, but these systems lack some of the basic, yet critical tools for managing long-term client relationships. As a result, most investment managers recognize that customer relationship management (CRM) systems facilitate prospecting and ongoing client management.

Microsoft Dynamics CRM is the ideal solution for investment management firms due to its operational simplicity, its powerful strength as the de-facto operating platform for investment firms, and its' incredible flexibility which enables it to be customized to the unique business processes of individual firms.

Why Green Beacon?

Green Beacon Solutions has worked in the financial services sector since 2001. Founded by a team of service professionals with years of experience working with investment management firms, we have successfully implemented CRM solutions that define logical workflows which seamlessly incorporate existing business processes while meeting regulatory and reporting requirements; consolidate meaningful client information for identifying new sales opportunities; and facilitating relationships with existing clients.

Key solutions that Green Beacon has developed for investment management firms include:

Financial Data Integration: Integrating data from third party data providers, such as Standard and Poor's MMD™ and BigDough™, that streamlines prospecting and contact management and provides useful fund allocation and other demographic data. Traders and Account Managers can leverage this data for prospecting identification and sales.

Call and Activity Reporting: Activity reporting provides a centralized solution and a standard business process for tracking conversations with customers or accounts, and sharing the context of the conversation with others in the organization that involved in managing the client relationship.

Portfolio Analysis: Account Managers access standardized portfolio reporting solutions that enable them to deliver customer-specific performance, asset allocation, and other key metrics to customers and prospects.

Maintain Microsoft Dynamics AX with Green Beacon's

SmoothSail Managed Services

- Dedicated support staff at our Newton, MA HQ
- On-demand and cost-effective management services for CRM and ERP applications
- Advisory services to increase business efficiency by improving system usage
- Support and maintenance services to reduce down-time and ensure productivity so that systems operate at high availability



- Established in 2001
- Headquartered in Boston, Massachusetts
- Offices in New York, Philadelphia, and Houston
- Specialists in Microsoft Dynamics Business Solutions
- ERP and CRM Consulting Services
- CompassPoint Solution Software Accelerators
- SmoothSail Support & Managed Services

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