



Scottish Equity Partners

High functioning deal flow management and data analytics to accelerate performance and support business growth.

Summary:



45-man
Venture Capital firm



Setting the route to
overcome operational
efficiency



Guidance and support
through development
and adoption



Rapid deployment with
the Xpedition Private
Equity Accelerator



Enhanced deal flow
management and
performance



Performance and growth
target met, supported
by Xpedition

The Challenge:

Advanced VC functionality and integration at pace

SEP knew the benefits of their existing CRM. However, the firm had outgrown its capability and sought a more sophisticated and enhanced replacement for the future. As a specialist investor in the technology sector, SEP appreciates the value of innovative digital solutions to drive business performance. Therefore choosing a highly regarded, cutting-edge solution with full deal flow visibility, intelligent reporting and mobile capabilities was essential.

Microsoft Dynamics CRM/365 was the most robust and well-developed platform on the market, with strong investment from Microsoft evident in the clear progression and innovation of their offering. CRM/365 was also a good fit with their overall technology strategy for Office 365 and SaaS cloud computing.

To go with the market-leading platform, SEP needed an expert service provider to manage the implementation. Their priorities were sector expertise in PE/VC and proven capability to deploy rapidly, to reduce disruption to everyday operations and take advantage of data insights quickly.

“We recognised that an expert partner with a real understanding of our specialist sector was as important as choosing the best technology.”

Stuart Paterson, Partner

The Solution:

A rapid route to deal flow and performance insight

Industry expertise and the Xpedition Private Equity Accelerator were key for SEP. The Accelerator refines Microsoft Dynamics 365 to the specialist functional requirements of the sector. SEP were keen to benefit from the new platform rapidly. The PE Accelerator meant a faster path to an industry specific solution configured to suit SEP's individual requirements.

The Xpedition team focused first on data migration and activating out of the box functionality to provide the core functions and data that SEP needed. In the second phase, Xpedition integrated third party products and more sophisticated configurations. The final step was to add new investor relations capability.

“We knew we needed to make our systems accessible and relevant to our team so they could respond quickly and effectively to situations in a competitive market. Dynamics fitted well with our Office 365 strategy. The PE Accelerator made Xpedition's solution truly relevant to our activities and was a decisive factor.”

Stuart Paterson, Partner

Accelerated delivery by Xpeditio

Powered by Microsoft Dynamics and tailor-made to manage Investor Relations, Deal Flow, Fundraising and Reporting, the Private Equity Accelerator will enable you to be up and running in a fraction of the time.



The Results:

Swift deployment and positive user engagement

With its familiar Office 365 interface and intuitive controls, it's been easy for SEP to introduce the new system and convince the team of its benefits. Xpeditio worked closely with SEP's in-house business analyst during the deployment. Effective knowledge and skills transfer means that SEP is now largely self-sufficient in managing and supporting the solution day-to-day.

SEP's staff use the system both from desktops and mobile devices, meaning they can update and interrogate deal, client and market information wherever they are, and helping SEP make faster decisions and keep ahead of the competition.

With sophisticated real-time reporting and analytics from their new CRM solution, SEP can access reliable, insightful analysis on past performance and future projections for potential investment opportunities. New investor relations tools also help SEP to maintain relationships in a timely and relevant way.

“We recognised that an expert partner with a real understanding of our specialist sector was as important as choosing the best technology. After a competitive selection process, we felt Xpeditio was the best partner to work with, particularly given their track record in Venture Capital.

Our conviction was proved right throughout the project: we saved time and made rapid progress because of the consultants' knowledge and fully justified our confidence in their ability to define and deliver an effective solution for our particular needs.”

Stuart Paterson, Partner

About Xpeditio

At Xpeditio we guide your path to growth, through the implementation of intelligent cloud-based business applications. We help our clients to understand how technology can empower their business in real terms, and we deliver.

Previously known as TouchstoneCRM, we offer so much more than CRM and business software. We deliver real business value through expert consultancy. We're known for our questioning nature and for challenging the status quo.

We succeed when you succeed, inspiring clients with insight led guidance. Our market leading expertise and industry knowledge will help your business to reach its goals.

We understand your industry. Our experts are passionate about sharing their knowledge, revitalising client experiences, improving operational efficiency. At Xpeditio, we'll show you the way.

Fast-track your journey to CRM success with Xpeditio.

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