






Independent Franchise Partners


Client Engagement deployment powered by Dynamics 365,
as part of a broader digital transformation strategy

Summary:

 Core client, prospect and partner relationship management system

 Waitlist, on-boarding and off-boarding management

 Digital client communications with ClickDimensions

 Data management compliance, BI and reporting

 Integration with parallel digital projects

“During the Definition phase, Xpedition made a realistic and accurate assessment of the implementation timescale, which was very reassuring.

The team was highly flexible and worked to our schedule and budget.”

David Warlow, Business Manager,
Independent Franchise Partners

The Challenge: Modernise CRM and digital marketing capability

Independent Franchise Partners, LLP (Franchise Partners) was established in 2009 to offer the Franchise investment approach to institutional investors through a dedicated, independent investment management partnership. Capacity in both the US and the Global equity products is available via a waitlist process and current investors include a full range of pension funds, endowments and foundations, sovereign wealth funds and family offices globally .

Franchise Partners’ existing CRM solution was overly complex and underutilised. With an upgrade to Microsoft Office 365 already underway, the Firm needed to establish if Dynamics 365 was a cost effective solution that could help to solve its business challenges and streamline the client service function. The executive team knew that its chosen supplier needed to have sector expertise, and offer an assessment pathway that ensured the implementation strategy would align to its business goals.

The new solution would need to be flexible enough to support Franchise Partners’ Data Management requirements, and fully support the Firm’s client engagement strategy, waitlist, on-boarding and off-boarding processes.

The Process: Effective partnership through collaboration

Franchise Partners needed to weigh up its options - an upgrade with the existing supplier, a move to another well-known CRM platform, or a deployment making the best use of Dynamics 365 functionality configured by a partner that understood the Firm’s requirements.

A flexible approach and support for the Firm’s assessment were among the reasons the Xpedition team was selected. The initial scoping phase was low risk and established that Xpedition would be the right partner. The thoroughness of this phase helped to create a comprehensive project scope and answer key business case questions.

During the definition phase, Xpedition created a plan to cover all the existing and new functionality within a tightly defined scope and price. In deployment, data migration was particularly challenging due to dependencies on the incumbent supplier and underutilisation having led to quite a data degradation over time.

A number of data extraction and user testing phases had been planned to address this. There was no impact on budget or timescales despite the data challenges being much more complex than first identified. The solution included ClickDimensions digital marketing, to segment, manage and communicate to investors with important quarterly investment updates.

Sandeep Ghela, COO, Independent Franchise Partners

“Xpedition came highly recommended by our IT partner and Microsoft. From the beginning they demonstrated expertise in our sector, capability with Microsoft Dynamics 365 and the right pathway for an upfront assessment of its suitability for us. The engagement experience gave us confidence early on and in comparison to the alternatives, they helped us develop our thinking about how to approach this project.”



The Solution:

A leading edge platform with bespoke capability

The Xpedition solution made best use of off the shelf functionality in Dynamics 365, configured to Franchise Partners’ unique requirements. Knowledge transfer to the Firm’s team and on-going support has further helped provide a low total cost of ownership. The Firm now has all the benefits of a leading edge, robust platform with customised individual functionality.

Data security is critical for Franchise Partners. The Microsoft Cloud protocols tick all the compliance boxes. There were some extra challenges with access by users in remote locations. Once these were addressed, staff working in other offices could access the system and call on or add to the latest client insight any time.

Previously, there was no way for the Firm to view its critical client data in the right way for analysis and proactive management. The new solution means Franchise Partners can track trends and progress and evaluate the next best actions to foster deeper and longer-term relationships with its clients.

The project was delivered on time and on budget.

The Future:

Granular intelligence for strategic decision-making

The Firm’s new solution means it can easily track and manage institutional client relationships in a clean, simple solution, drill down to see how those relationships are developing, and identify the opportunities that need the most support.

Franchise Partners’ strategy also relies on being able to identify the highest potential value investment opportunities and develop and nurture those relationships accordingly. The Firm now has that visibility and insight both as strategic business intelligence and for day to day relationship management.

“The success of our IT projects has always relied upon the quality of our suppliers and partners. The Xpedition team exceeded expectations with its collaborative approach and understanding of our requirements, with a level of success and deployment that the previous supplier was never able to achieve.”

David Warlow, Business Manager,
Independent Franchise Partners

About Xpedition

At Xpedition 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 Xpedition, we’ll show you the way.

Fast-track your journey
to CRM success with
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