



Martin Currie Investment Management and Redspire collaborate to connect the global front office using Microsoft Dynamics 365

OVERVIEW



CLIENT

Martin Currie Ltd



INDUSTRY

Investment Management



SOLUTION

Microsoft Dynamics 365



DATES

April – June 2020



BUSINESS OUTCOMES

- System stability
- Single customer view
- Sales enablement
- Better reporting
- Data insights
- Informed decision

THE CHALLENGE

As their legacy Dynamics system approached end of life/support, Martin Currie Investment Management Ltd required a new CRM system to support their global Sales, Marketing and Business Development front office, who operate in disparate time zones. The project was deployed in two phases.

- Migrate and upgrade to Dynamics 365 for Customer Engagement
- Implement and integrate Dynamics 365 for Marketing

Stability, maximised efficiencies and a simple UX were key requirements, as well as the ability to augment existing systems and provide teams with a single customer view. The project sought to future proof digital infrastructure and processes and end reliance on a single system, provider and partner. The team sought a stable cloud based system, available 24 hours a day, 365 days a year in all time zones.

THE CLIENT

Martin Currie Investment Management Limited is a global organisation that offers asset management, equities, securities, investment strategies, financial planning and advisory services to customers worldwide. Operating since 1881 with £11.2bn Assets Under Management, the business has 110 employees operating across five global offices.

Their stock-focused approach is driven by in-depth fundamental research and skilled portfolio construction. Martin Currie's key goals are to gain a holistic view of investee companies and an insight into their culture to build an understanding of material risks and opportunities, develop conviction in ideas, and deliver differentiated client outcomes.

Martin Currie Investment Management Limited is a Specialist Investment Manager of Franklin Resources, Inc. which has Assets Under Management totalling US\$1.4 Trillion.

since
1881

5 global
offices

11.2bn
AUM

US parent
company
\$1.4 Tr AUM

APPLICATIONS

-  Dynamics 365 for Sales
-  Dynamics 365 for Marketing
-  Office 365
-  Outlook
-  Sharepoint
-  Power BI
-  Power Automate
-  Loqate Address Look-up

CLIENT FEEDBACK

“

The project was delivered on time, it restored system dependability and increased confidence across our sales and commercial teams in multiple geographies. A key objective was removing reliance on a single system and partner. Dynamics has solved that for us.

The team now spend more time on qualitative data analysis and access data much easier, thanks to improved visual reporting and MI capabilities.

We have such great visibility now on workflow and can manage resource effectively. We're actively using every capability the solution offers, to the huge benefit of the business.

”

THE SOLUTION

Redspire's approach was to rebuild Microsoft Dynamics 365 for Customer Engagement online, hosted by Microsoft. Microsoft Dynamics 365 Marketing to provide an integrated digital marketing suite. Out the box functionality was maximised with customisations and configurations, rather than development, to remove any dependencies on specific partners going forward. Furthermore, this approach allowed Martin Currie to leverage existing Office 365 licenses using the out the box integrations to Outlook SharePoint and PowerBi.

Redspire's approach was based upon sound, proven methodologies that ensured the new Dynamics 365 system and integrations were built precisely to the client's needs. The project's digital and data infrastructure not only achieved Martin Currie key outcomes, but provided the perfect foundation for the future continuous digital improvement that the business sought.

BUSINESS OUTCOME HIGHLIGHTS



**stable and secure
cloud system**



**single customer
view**



**connected front
office**



**sales
enablement**



**significant annual
cost savings**



**informed decision
making & reporting**



**resourcing
efficiencies**



**productivity
gains**

WHY REDSPIRE?

“Our analysis and scoping led us to Dynamics 365. It offers more features available out the box, was customisable to current and future needs and suited our wider technology suite. Microsoft then recommended Redspire as a technology partner for implementation.

Apart from understanding the scope of work, they were stand out partner in terms of approach and rapport. They didn't try to oversell or overdevelop the project, they listened carefully and met our requirements.

Redspire's approach and turnaround was efficient and effective. During implementation, updates and progress reporting were daily and structured. Communication was good and I was aware of progress at every stage. They're a great client facing consultancy with strong people. The weekly project call and status report gave me really useful insight to share with the key stakeholders and financial teams too.”

Hayley Keenan, Head of CRM, Data and Change