



## Customer Success Story

# Leading Private Equity firm leans on **D365 Sales and Dynamics GP** to manage **investments and client relations**

### About the Client

The client is a successful private equity firm headquartered in Pennsylvania. They provide investment advice and portfolio management services to high-growth companies throughout the U.S.

### Solution

- DemandDynamics helped integrate Dynamics 365 Sales with Dynamics GP and other operational systems, enabling collaborative data sharing with partners, and clients.
- This includes extensive custom reports for investment management and clients, including Power BI for dashboard views of critical information for management.

### Benefits

- ✓ The client uses D365 Sales to track client communications enhancing its trusted relationships and delivering value.
- ✓ The successful deployment has significantly enabled their portfolio and client base growth, maintaining a streak of brilliance in client satisfaction.