



Envision your future in **Asset & Wealth Management**

Our experts are here to help you solve key challenges such as:

- Gaining visibility into capital inflows and outflows
- Reducing churn and increasing wallet share
- Maintaining profitable growth
- Prescriptively defining next best action for client relationship managers
- Demonstrating greater value to clients
- Adapting distribution models to address intense cost pressures and expanding customer expectations

Empowering Advisors by Eliminating the Guesswork

Asset and wealth management firms must evolve to stay in compliance, provide better client service, and take advantage of every opportunity. Yet, legacy systems and point solutions can't provide the visibility, flexibility, and scalability you need to address these rapidly changing requirements.

In this new reality, how do you envision the future state of your organization? Build your transformation strategy with Microsoft Catalyst, a proven and powerful approach to innovation.

Let's ideate together

As part of Catalyst, meet with our experts and run an envisioning workshop, where we can ideate together using design led thinking concepts and jointly define how to enable the digital transformation of your organization.

This one-day briefing starts with a review of your business objectives, followed by mutual discovery and visualization of solutions, ending with a clear, actionable picture of how we can help you reach your business goals.

How HSO can help

HSO is a global technology and professional services company that specializes business transformations leveraging the Microsoft platform. We combine innovative technology with extensive industry expertise to help you achieve and maintain a competitive advantage in today's digital and global world.



the results company

DynamicsAdvantage for Asset & Wealth Management

What is Microsoft Catalyst?

Build, plan, and execute business transformation strategies with a proven, innovative approach from Microsoft Catalyst—an envisioning and planning program that employs Microsoft Dynamics 365, the Microsoft Power Platform, and the Microsoft Cloud. Your business transformation starts with an I.D.E.A.

Start by finding the transformation strategy that's right for you. Define and prioritize your strategy using development activities, then foster ideation and drive decision making with an envisioning workshop.



Inspire

Imagine a future state solution for your business

➤ Envisioning Workshop



Design

Discover what's possible by aligning technology investments to business goals

➤ Business Value & Solution Assessment



Empower

Empower others in your organization to see the value

➤ Solution Demonstration



Achieve

Achieve business outcomes and improved customer experiences

➤ Transformation Plan

For more information visit: <https://dynamics.microsoft.com/en-us/microsoft-catalyst/>

DynamicsAdvantage for Asset & Wealth Management

Powered by Microsoft Dynamics 365, HSO's DynamicsAdvantage for Asset & Wealth Management provides you with a new platform for true digital transformation.

Empower Wealth Advisors by Eliminating the Guesswork

- Proactively manage your book of business with visibility into accounts and holdings from both external and internal systems in a single location
- Use the Advisor Dashboard to prospect more efficiently, knowing who to call and when
- Capitalize on new opportunities with comprehensive analytics and reporting
- Speed onboarding by tracking the status of work items and providing a positive digital client experience

Help Your Asset Managers Get a Handle on Your Products...and Who is Buying Them

- Gain visibility into their entire network of consultants, broker dealers, and institutional clients to see how they're connected, their funds, and the clients they influence
- Tear down the silos between intermediary and institutional businesses to take full advantage of relationships on both sides and accelerate growth
- Stay on top of multiple lines of business by drilling down into underlying data through the AUM breakdown dashboard, slicing and dicing information by channel, fund, region, strategy, and vehicle
- Walk through guided processes and quickly see where an opportunity is in the sales pipeline and key information about the deal

Get Started

Request an envisioning workshop today!

Contact us at HSO-CA-Marketing@hso.com



Gold Cloud Platform
Gold Cloud Business Applications
Gold Cloud Customer Relationship Management
Gold Enterprise Resource Planning
Gold Application Development