

Geo:	Canada
Industry:	Financial Services
Vertical:	Investment Management
Solution:	D365 F&O, Power BI
Sales Play:	Activate Digital Selling
Date Closed:	8/10/2021
Won Against:	SAP, Other D365 partner
MSFT Deal Size:	\$89,015
Replaced:	Dynamics SL



Customer Situation & Goals

- Richardson Wealth merged their financial services and clearing (RF Capital Group) into a single entity named Richardson Wealth Ltd. Both entities were running on-premise versions of Dynamics SL. As part of cloud first strategy wanted to move to a single cloud-based platform for ease of reporting and management.
- Richardson Wealth is a Canadian independent wealth management firm and the organization's data was siloed across multiple systems.
- Looking to standardize on a single platform that will provide advanced analytics capabilities that will improve the business insight for their employees. It will allow them to surface key operational and performance metrics to support effective execution of business processes.

Solution

- Dynamics 365 F&O a single end to end cloud platform that will serve as the central repository for all Richardson Wealth data
- Workspaces, Power BI and workflow for improved collaboration
- Robust financial capabilities with strong multi-company, consolidation and budgeting
- Integration to Concur which manages employee expenses and AP invoices.

Co-Sell & Field Insights

- This account is a managed Microsoft account. SHEA Global was brought into the opportunity by Microsoft.
- This win is apart of SHEA Global, now apart of the HSO Family
- Microsoft did early excitement demo's. SHEA global did a series of demo's tailored to their requirements.

Richardson

Why We Won

Richardson Wealth selected Dynamics 365 primarily based on:

- Strong financial services experience.
- Implementation approach
- Local Toronto area presence

HSO Team



Erroll Rowe, Sales Executive

Microsoft Team



Ahmed El Sharkawi



Angela Henne



Taylor Newsom