



VERMÖGENSVERWALTUNG
PRIVACON

INDUSTRY

- Services

PRODUCTS/SOLUTIONS

- BPA CRM & Project Management
- Microsoft SharePoint
- Microsoft Office 365
- Microsoft Flow

THEMES

- CRM
- Mandate & Service Management
- Project Management

SUMMARY

PRIVACON Vermögensverwaltung GmbH is a financial advisor and wealth manager for private and institutional investors located in Cologne, Germany. Originally founded in 1997, all financial services are combined in one business group since 2010.

As one of the pioneers in ETF-based portfolio and fund management PRIVACON's business unites active, individualized financial management and passive, rule-based investment. To accomplish fast communication and to have comprehensive documentation for all funds and consultancy services, using modern and up to date tools and software is key for the company.

CHALLENGE

PRIVACON wanted to manage complex relations between different CRM entities, which was not possible with their previous CRM solution.

Because the company recently moved to the Microsoft cloud, they were looking for an Office 365-compatible CRM solution, accessible from any location.

As a small-sized organization, PRIVACON needed a very flexible solution with maximum return on investment and highest effectiveness/cost ratio. Also, it was very important for the company to be independent in configuring and extending the solution.

STRATEGY

The first step of the project was to rethink relations between entities and define the data structure. After 3 online sessions with a BPA consultant, new entities and relations were configured in the software. The system was ready for data import.

The CRM software was configured by PRIVACON between BPA online training sessions. Thanks to the product flexibility and very productive meetings, 2 days of consultancy were enough to achieve the first step of implementation step.

The next coming project step will consist in implementing sales dashboards and automate tasks and processes. BPA is expected to provide guidance in configuring a tailored sales cockpit and transfer knowledge to PRIVACON's power users. The company is starting to use Microsoft Flow and needs BPA to share experience in building flows for automating business processes.



BPA Solutions SA (Switzerland)
BPA Solutions USA LLC (Seattle, WA)
<http://BPA.Solutions>



RESULTS

PRIVACON's top management was looking for a solution delivering maximum revenue/cost efficiency and they are very satisfied about the highly usable solution obtained with a small investment, what was a clear benefit compared to other solutions.

After a short guidance, end users were very positive about the simplicity of the system. The app is self-explaining thanks to a

user-friendly navigation, clear relations and explanation panels.

The company intends to further extend the solution and include other business-critical processes. For this reason, the solution was renamed in "GUS", an abbreviation of "Total Corporate Control" in German language.

✓ WIN RESULTS

““ The error rate on routine tasks has drastically decreased thanks to making processes easier with BPA software.

““ Relations between clients, contacts and accounts are now clearly defined and visualized, which was not the case before.

““ By configuring the app mostly ourselves, we could maximize the project revenue/cost efficiency. It is vital for a small-sized company to have this flexibility and autonomy.

