



## Envision what your future in Wealth Management looks Like

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

- Delivering a modern, digital client experience
- Consolidating existing relationships and winning new clients
- Addressing the challenge from digital disruptors
- Increasing share of wallet
- Meeting burgeoning regulatory requirements
- Streamlining onboarding

### Empowering Wealth Management

The Wealth Management landscape is rapidly shifting. Today's leading firms are the those that can evolve and adapt to fend off the challenge of the digital disruptors, effectively analyse valuable data, deliver a holistic, digital client experience, and meet the demands of a complex regulatory environment.

*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 organisation.

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

### How Xpedition can help

With 20 years as a Microsoft Gold Partner and more than 630 successful Dynamics 365 projects delivered, Xpedition has extensive experience in the Financial Services sector helping organisations on their path to growth.

# 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 prioritise 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

## Design

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

## Empower

Empower others in your organisation to see the value

## Achieve

Achieve business outcomes and improved customer experiences

➤ Envisioning Workshop

➤ Business Value & Solution Assessment

➤ Solution Demonstration

➤ Transformation Plan

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

# Xpedition Wealth Management Accelerator

Built on Microsoft Dynamics 365 and the Power Platform, the Xpedition Wealth Management Accelerator empowers users thanks to unique features that deliver business growth and a modern, digital client experience. By leveraging a holistic, 360-degree view of critical client and investment data, firms can maximise client value through the use of intelligent business applications. Key features include relationship intelligence, pipeline management, KYC and onboarding, regulatory compliance and audit trail functionality, and digital marketing & communications management.

**Get Started**

Request an envisioning workshop today!

[www.xpedition.co.uk/contact-us](http://www.xpedition.co.uk/contact-us)

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