



## Envision what your future in wealth looks like

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

- Generating value with proactive insights
- Personalize every customer engagements
- Deliver always available services to any device
- Optimize sales productivity
- Build new agile business processes



### Empowering intelligent sales and advice.

Across Capital Markets we are seeing more rigid compliance and regulations, as well as emerging products that are significantly more complex. With lower margins and tighter cost controls significantly impacting the channel, organisations must be more focused than ever before on delivering a better customer experience. But complicating matters further is the fact that the industry as a whole is filled with complex hierarchies that make it inherently difficult to develop 360-degree views of the client experience and journey.

### 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 solution capabilities, ending with a clear, actionable picture of how we can help you reach your business goals.

### How HCL Technologies can help

HCL Technologies delivers end-to-end business transformation and strategic application design-and-builds throughout the Financial Services. We are a leader in delivering Microsoft Business Applications through unparalleled offerings of service, support, education and add-ons.

**HCL**

High-Performance Customer & Advisor Engagement  
with PowerCapital

# 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

## Design

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

## Empower

Empower others in your organization 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/>

## PowerCapital

PowerCapital is a fully extensible customer engagement data model built with 9 pre-defined user personas and Capital Markets organisational types. The model works by dictating – based on persona selected – which model-driven App and associating data fields, forms, views and processes, as well as which tools from the Microsoft Business Applications stack, are needed to suit the way in which firms operate and go to market. PowerCapital provides Asset & Wealth Management firms capability to manage complex relationships, optimize sales and service efforts, and enable a true reflection of Assets Under Management across multiple investors, products, and territories. Advisers can send targeted offers to each customer based on their individual profiles, risk tolerance, and needs and with view live fund information through an integration framework to various transfer agents. Let PowerCapital help increase sales productivity and realise operational efficiencies across the organisation.

## Get Started

Request an envisioning workshop today!

*For more information, reach out to [Greg.Harradence@hcl-powerobjects.com](mailto:Greg.Harradence@hcl-powerobjects.com)*

Microsoft  
Partner

2019 Partner of the Year Winner  
Dynamics 365 for Customer Service Award  
Financial Services Award