

## Advantage selects IS Partners for Microsoft CRM solution

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Advantage Asset Managers, a multi-manager asset management firm, has implemented Microsoft Dynamics CRM for the management of its sales, service and marketing activities.

Microsoft Gold Certified partners, IS Partners, was responsible for the implementation of the solution, which will address the service and performance requirements of Advantage's various business units.

Previously, Advantage Asset Managers shared information via its network, while regular meetings ensured information could be collated and verified. This did not offer integration capabilities as much of the information was stored and amended on personal computers. "This prompted Advantage Asset Managers to look to a solution that could provide centralised access to current information as well as a central management system of that information," says Neelan Pillay, Head of IT and Project Delivery at Advantage.

The company has three distinct business lines, explains Heath Turner, CRM director at IS Partners. Multi-Manager Products provides services to small and medium sized corporate and retirement fund investors, Multi-Manager Solutions provides customised products and services to large corporate and retirement fund investors, while Multi-Manager Administration provides services to Advantage's other business units as well as third party clients.

Turner adds that the CRM solution will ensure improved efficiencies across the organisation, and meet Advantage's requirement for the solution to be up and running within a very short timeframe.

Advantage's key business objectives are to support the current main sales and service processes, provide a uniform and consistent view of information and provide key reports and roadmaps.

Microsoft Dynamics CRM has been selected as the solution that all business units will use to manage sales, service and marketing activities. The initial requirement is to configure the sales and service modules to meet Advantages short term requirements.

The solution had to meet Advantage's requirements in each of its core business areas, says Turner. "Centralised and consistent data will assist Advantage in meeting its objectives of cutting-edge investment research capabilities and tools that ensure informed decisions for investors, while also supporting the company's core investment expertise."

Advantage also has a number of teams responsible for providing services for client and asset administration, accounting, reporting as well as technical and pricing.

"Microsoft CRM will deliver improved performance across Advantage's service teams through enhanced reporting and search features, an improved user interface as well as query and case tracking capabilities," Turner adds.

"We selected IS Partners for the solution implementation due to their ability to meet a tight implementation timeline, experience in the implementation of CRM systems and, in particular, Microsoft Dynamics CRM, the implementation approach, CRM resources within the organisation and the ability to meet our future requirements," Pillay adds.



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## About IS Partners

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Established in 2001, IS Partners addresses the need for quality implementations of Microsoft solutions. As a Microsoft Gold Certified Partner for Performance Management, Business Intelligence and Customer Relationship Management, IS Partners specialises in empowering sales, marketing, financial and management in its customer base. This includes various industries such as retail, distribution, finance and IT.

IS Partners uses its own proven, streamlined methodology for all implementations. It also specialises in bringing bottom line value to CRM and BI systems, providing business analysis, technical design, application architecture, implementation, training and performance tuning of CRM and BI implementations on the Microsoft platform and Microsoft's own CRM solution.