

BGM TRUNORTH

WEALTH PARTNERS

BGM TRUNORTH WEALTH PARTNERS UPGRADED TO MICROSOFT DYNAMICS CRM 2013 AND USES THE XRM CUSTOMIZATION CAPABILITIES TO FIT THEIR BUSINESS NEEDS IN THE WEALTH MANAGEMENT AND SERVICES INDUSTRY.

CHALLENGE

BGM TruNorth Wealth Partners needed to upgrade to Microsoft Dynamics CRM 2013, migrate their data, and be able to fully customize their system to fit their business needs.

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SOLUTION

Microsoft Dynamics CRM

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BENEFITS

- Upgrade to Dynamics CRM 2013
- All data migrated to own servers
- Fully customized XRM
- Easy integration of existing tools



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About the Organization

BGM TruNorth Wealth Partners is a Registered Investment Advisor. They act like personal CFO's for their clients in providing comprehensive wealth management services to entrepreneurs, small business owners, corporate executives, and high-net-worth individuals and foundations. They specialize in comprehensive strategies for financial planning, investment management and tax planning.

Situation

BGM TruNorth Wealth Partners needed a fully customizable CRM solution and decided to switch to Microsoft Dynamics CRM 2011 after utilizing a CRM system specific to the wealth management industry that lacked customization capabilities. When the previous partner they were working with decided to no longer support customizable CRM platforms, BGM TruNorth selected PowerObjects as their new Dynamics CRM partner. They chose PowerObjects because of their expertise in the training of advanced customization techniques and one-on-one education options.

Overall, BGM TruNorth needed a partner that would:

- Assist with an upgrade to Dynamics CRM 2013
- Migrate all data from the previous system to their own servers
- Provide customizations to fit their unique business needs and processes if needed
- Provide Dynamics CRM support

Solution

BGM TruNorth needed to upgrade their system from Dynamics CRM 2011 to 2013 and then migrate their data to their own servers. The organization chose PowerObjects as the Dynamics CRM partner to ensure the migration and upgrade went smoothly. "We were nervous at the thought of having to take on a project like this on our own. We wanted to ensure we had a good system in place in order to feel comfortable having everything on our server, so we decided we needed PowerObjects to help with the CRM migration and upgrade," says Britta Scampton, Systems Design Engineer at BGM TruNorth.

BGM TruNorth uses the custom XRM aspects of Dynamics CRM to track important financial data such as portfolios and tax information—all of which require many customized workflows. "Much of what we do is driven by algorithms, so for example, if a client fits a certain profile they will need these particular services, or if they have this particular tax return or information they should be deploying this specific strategy. XRM has allowed us to automate all of these strategies," says Peter Rekstad, CEO and CTO of BGM TruNorth.

The organization also uses their Dynamics CRM solution for case management, which helps them manage and track client projects and improves the effectiveness of their team. The ability to automate the tracking of a client profiles helps BGM TruNorth provide proactive service to their clients. "Delivering a great client experience is about managing the financial details of our clients' lives," adds Rekstad.

"The XRM capabilities of Dynamics CRM really allows us to use the system to manage algorithms and to inform the team of where client attention is required. Before Dynamics CRM, we had to spend our energy on keeping track of when our people needed to get involved in a client's financial ecosystem. Now we know at a moment's notice without having to spend a lot of time on tracking."

ABOUT POWEROBJECTS

Established in 1993, PowerObjects is one of a handful of organizations recognized as a leader in delivering Microsoft Dynamics CRM/xRM solutions to customers. PowerObjects fully embraces the power of customer choice and offers hosted, on-premise and online CRM deployment options.

PowerObjects provides CRM solutions to businesses and non-profit organizations in multiple industries including healthcare, life sciences, insurance, financial services, publishing, distribution, manufacturing and professional services.

AWARDS + RECOGNITION

2012

Microsoft Dynamics Partner of the Year

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2011

Inner Circle for Microsoft Dynamics

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2009 + 2010 + 2011 + 2012

President's Club for Microsoft Dynamics

+++

3

Convergence Customer Excellence Awards

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GOLD + SILVER

Customer Relationship Management



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Solution (continued)

As BGM TruNorth has undergone changes and growth, Dynamics CRM has been a flexible solution for the organization. With PowerObjects' continued support and one-on-one training, BGM TruNorth can take the time to continue to grow their CRM system to other aspects of their business. "We love the flexibility of Dynamics CRM and how it can continue to evolve with us," says Scampton. "We are just starting to use CRM in our sales and marketing, and we're beginning to utilize PowerObjects' PowerPack add-ons to help integrate marketing."

PRAISE FOR POWEROBJECTS

"Our upgrade experience to 2013 with PowerObjects was amazing. Their team was specialized and understood the upgrade process—we did not get caught up in somebody's learning curve."

PETER REKSTAD

CEO and CTO of BGM TruNorth

Benefits

By upgrading to Dynamics CRM 2013, BGM TruNorth has been able to utilize more updated features and enhanced customizability – with the intuitive user interface and addition of business rules being particularly helpful. "Dynamics CRM 2013 is such a step forward in user interface and organization, our users had a minimal learning curve when making the 2011 to 2013 switch. One huge upside for us was business rules. This has enabled us to easily shape our user experience by supporting the learning curve and providing the users with the right information at the right time," says Rekstad.

With PowerObjects, the upgrade and migration was a smooth process for BGM TruNorth. "Our upgrade experience to 2013 with PowerObjects was amazing. Their team was specialized and understood the upgrade process—we did not get caught up in somebody's learning curve. Our upgrade came in at about half of our budget because no custom coding needed to be re-written. This saved us time and money," Rekstad says.

From an industry standpoint, the Microsoft Dynamics CRM platform has been a major benefit by allowing BGM TruNorth to create a system fully customized to fit the wealth management industry. The organization can uniquely utilize the customization capabilities of Dynamics CRM to fit their business needs and it can replicate key equations created by their own employees to be used by the business as a whole.

"Financial Services is very unique in that it is an entirely math-based field. Dynamics CRM is a great resource because our industry is so equation-based and there is a lot we need our system to monitor and track for us. With the automation and customization capabilities of Dynamics CRM, we can input our own algorithms and it's like we are putting the best financial minds directly into our CRM system. This is definitely an advantage for our industry as there is very little we can't program into the Dynamics CRM system," says Scampton.

With PowerObjects and Microsoft Dynamics CRM, BGM TruNorth has a fully customizable system that is tailored to their business needs and can integrate existing tools and technologies—all at an affordable price. "Since Dynamics CRM is built on SQL it is really easy to integrate other tools. The architecture opens up a lot of doors for us to do low cost integrations," says Scampton. "Dynamics CRM gave us the ability to create software we couldn't buy anywhere else and would have been cost prohibitive to have created for us. Dynamics CRM is a cost effective solution that can be maintained and customized in-house—and we now have the software our business needs."

"We've had a great experience working with the PowerObjects team. We have the best person for the job when it comes down to it and we always feel like our goals and projects are accomplished," adds Scampton.

2014 Microsoft
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Customer Relationship
Management (CRM)