



Kay Holdings: Focus on Data Centralization for Aligning Objectives

The Challenge:

The World of Private Wealth Management is Volatile

With growing client needs and the rapid changes in the marketplace, Kay Holdings felt their existing CRM system was falling behind. Their existing system lacked the ability to integrate with Microsoft Outlook, which was a major concern to the company's management team since it was impossible to control, and track how employees were accessing and leveraging the various modules of integrated data available.

Keeping everyone aligned from a business process standpoint while growing and cultivating new business was a challenge. Kay Holdings's management team wanted to track how they were performing against their business objectives and client services. In the past, the company focused primarily on wealth management, but now they wanted to expand their services to include investment management as well.

Client Overview



INDUSTRY: Wealth Management

COMPANY SIZE: Private investors, corporations, hospitals and endowments partner with wealth management firm

With the previous processes in place, there was no centralized repository for information and no way to track the history of internal communications. This meant the company's COO had to spend time meeting individually with members of the firm to get the required information. This detracted from the strategic growth of the company, which included generating new clients, products and services. Kay Holdings need to send reports to their clients much faster. More specifically, having current data and portfolio values daily was a critical business priority.



The Solution:

Architecture Analysis of Current System

One of the first tasks completed before deployment was an architecture analysis of the current system, and to craft a blueprint for the desired new system. A key objective was to integrate all the company's processes which included data access, reporting procedures and additional workflow items into a manageable electronic document system. Interoperability between the email system, calendaring, centralizing standard documents and templates and ensuring a continuous integration with Microsoft Outlook was also crucial.

- By deploying Microsoft Dynamics 365 for Sales, Kay Holdings was able to integrate a wide range of services into their investment offerings and consolidated reporting tools
- Prior to working with Velosio, the firm was unable to offer its clients access to "real time data" on their investment portfolios, thus significantly taking their customer service to the next level

The Results

- Data, speed, access and accuracy streamlined in business processes
- Overall operational excellence and customer satisfaction
- Kay Holdings achieved "high water mark" goal of \$1.5 billion, which was attributed to better asset and real time data tracking

Working with Velosio

"We selected Velosio because they were vendor neutral and recommended the right CRM package based on our existing IT system, client capacity, present and future needs and ease of universal adoptability among the enterprise team members."

-CEO, Kay Holdings

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