



## Caltius Capital Management: Implementing Technology to Keep Up with Growth

### The Challenge: Lack of Integration

Since inception, the company had grown from managing \$100 MM of capital to investing more than \$650 MM, their staff had more than doubled, and their teams were now geographically dispersed. The casual contact and information exchange Caltius relied on the past was no longer effective and neither were their IT systems.

#### Challenges included:

- Applications being used by both front and back office staff varied and were not integrated, causing duplication of work
- Inability to track emails and/or integrate them
- Dramatic change and variation in use of technology (from laptops to smart phones to electronic tablets to legal pads)

### Client Overview



**INDUSTRY:** Financial services – provides capital to companies across the U.S.

**COMPANY SIZE:** Approximately 50 employees; privately held company

### Solution: Flexibility and Collaboration

Velosio recommended Microsoft Dynamics 365 for Sales for its flexibility, native Windows look and feel in addition to its tight integration with other Microsoft products that company employees were already comfortable using.

Velosio provided:

- Custom fields and work flows utilized by other private equity clients



- Use of Scribe to scrub data from multiple sources, eliminate redundancies/inconsistencies, and import clean data into Microsoft Dynamics 365 for Sales
- Recommendation of ClickDimensions, a third party marketing tool to allow the company to send press releases and conference information while capturing in the CRM
- Comprehensive on-site and web training for a wide range of users by Velosio staff

## The Results

- Increased productivity, maintenance of key contacts, and enhanced monitor and manage deal flow
- Maximized value of prospects, investors and referral sources
- Ability to visualize business trends and reduce administrative redundancy and burden
- Improved investor relationships as a result of instant access to individual investor accounts, enhanced communication, and report accessibility
- Systematic way to track and manage client communication

*“Velosio really seemed to understand our business. We have close to 10,000 contacts in our database. We needed a way to stay connected to these people so they would continue to provide us with investment opportunities and leads. We also needed to better identify firms and individuals that were sending us deal flow.”*

 **Ready to grow your business?**

Call 888.725.2555 or email: [info@velosio.com](mailto:info@velosio.com) and start a discussion with a business technology expert.