

Case Study: Edge Capital

Story

- Edge Capital, an Alternative Assets Fund of Funds Manager, used GV to manage relationships and compliance with 3rd party managers as well as due diligence. Edge needed to securely store client records in an automated fashion even though they currently had a well catalogued Windows directory
- GV implemented Microsoft Dynamics CRM 4.0 and integrated it with SharePoint

Results - From the Horse's Mouth: Pieter Viljoen, CIO

- “GV’s experience in financial services assisted them in understanding our business and providing relevant solutions. Integration with SharePoint was a bonus for us that GV brought to our attention.”
- “The system is efficient as we have access to the latest version of any document and a log of emails and telephonic discussions at our fingertips. We are now able to access client details, documents, and notes remotely via the Internet, further improving our productivity.”
- “The transition to use was easy due to its user-friendly interface. CRM’s integration with Outlook means that emails can be automatically linked to the relevant client or fund. The end result for us is a central and up-to-date view of all communication regarding a client across the team.”
- “The implementation was very successful and GV has been very responsive to further requirements. We will be calling them back for Phase 2, which includes Blackberry and iPhone integration.”

