



### Dynamics CRM Online, Scribe Insight

Gerstein Fisher deployed Dynamics CRM Online with a deep integration to their Portfolio Accounting system through the Scribe Insight platform.

### About Gerstein Fisher:

Gerstein Fisher is an investment management and advisory firm based out of New York. Per their website, "We take an integrated, quantitative, research-based approach to investment management on behalf of individuals, families and institutions". You can read more about Gerstein Fisher at [www.gersteinfisher.com](http://www.gersteinfisher.com).

### Business Requirement:

Gerstein Fisher approached CloudFronts with the following requirements -

1. Migrate from their existing CRM solution to Dynamics CRM Online.
2. Develop Key financial reports on top of CRM Online.
3. Integrate Dynamics CRM with their Portfolio Accounting system for complete access to customer data within Dynamics CRM.

### Solution Delivered:

Gerstein Fisher wanted to migrate from an existing CRM solution to Dynamics CRM Online, customized for their Financial Services business. The CloudFronts team worked closely with the Gerstein Fisher project team to migrate all customer data and delivered a CRM Online solution with rich customizations as per Gerstein Fisher's unique business processes. Key financial reports developed by our team ensured that Gerstein Fisher team had a complete understanding of their customers. Finally, the CRM solution was also integrated with the Portfolio Accounting platform using Scribe Insight to provide access to all customer data from within Dynamics CRM.

### Key Benefits:

Key benefits of our integrated solution are listed below –

1. A customized CRM solution for Gerstein Fisher to manage their business processes.
2. The integrated solution ensures access to key customer and financial data from within CRM.
3. Integration with Outlook ensures that the Gerstein Fisher team can operate from their existing Outlook platform.
4. Key customer financial reports in CRM provides a 360-degree view of the customer.

### Post Go Live:

Gerstein Fisher went live in 2015 and has continued to engage with CloudFronts for ongoing support and implementing new processes. The CloudFronts team also assisted Gerstein Fisher with their ClickDimensions deployment for Marketing Automation.

*"The CloudFronts team ensured a successful migration with all our data to the Microsoft CRM Online platform. We continue to work with them for ongoing support and implementing new business processes."*

- Bill Jollie,  
Sr. VP - Operations &  
Investment Management,  
Gerstein Fisher

### Key Technologies:

- Dynamics CRM Online
- Scribe Insight

### Connect with us!

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