



### About Equality Asset Management:

Equality Asset Management is a private equity firm founded by Thomas S. Roberts whose mission is to help build exceptional companies for the long term while offering investors innovative fee structures.

For more info, visit [www.equalityassetmanagement.com](http://www.equalityassetmanagement.com)

### Business Requirement:

Equality Asset Management team wanted to build a best in class way for organizing, sharing and storing information on prospective and portfolio companies it works with. There was a critical need to have a single business platform with a unified mechanism for collecting, organizing and tagging documents obtained from the initial discovery of a company through prospecting, diligence and portfolio company management cycles. And, they needed to have a seamless and secure integration between their Dynamics365 CRM and SharePoint file stores.

### Solution Delivered:

The CloudFronts Team addressed the business challenges by first streamlining the process of document management.

The Equality team was already using classic Dynamics 365 CRM interface. This interface was quite complex and needed a more intuitive user experience. There was a need to revamp the existing platform to remove unnecessary UI elements and to improve the ease of performing and tracking key activities.

First, the CloudFronts Team moved Equality to the Unified Interface which enabled its compatibility across all devices, including iPads and mobile phones. During the whole process from company identification to closing a deal, the relevant files will now easily be stored and organized securely in SharePoint. The above solution streamlined and re-organized the process of document management & avoided manual work and lack of standardization associated with manually managing documents and creating folders for each prospective company.

### Key Features:

1. Microsoft Dynamics 365 for Customer Engagement.
2. SharePoint Online.

### Post Go Live:

Equality Asset Management went live with the newly revamped platforms on 14 February 2019.

Because of the newly introduced Unified Interface, the Equality team is now able to access and experience the same functionalities from mobile and tablet which has increased their working efficiency.

### Key Technologies:

- > Microsoft Dynamics 365 for Customer Engagement
- > SharePoint Online

### Connect with us!

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