

ABOUT THE ORGANIZATION

What distinguishes Owl Rock in the crowded and highly-competitive asset management arena is their superior expertise in all credit markets, diverse experience in credit underwriting across myriad industries, and laser focus on American middle-market companies. Together, these strengths allow Owl Rock to offer a comprehensive direct lending platform that addresses the unique and often-ignored needs of middle-market business in the U.S.

Owl Rock currently has nine sales territories in the U.S. with 5,000-10,000 Financial Advisors each. That's a whopping 60,000+ contacts the team of 20 staffers must regularly contact, sell to, and manage – not an easy task without a robust and high-functioning CRM. And with that many Financial Advisors buying and selling every day, real-time and dynamic reporting capabilities are critical.

SOLUTION

In 2016, Owl Rock began weighing options for the right CRM solution to fit their needs. After comparing the pros and cons of a Salesforce.com versus Microsoft Dynamics 365 implementation, they ultimately chose Dynamics 365 – due largely to its seamless integration with the rest of the Microsoft stack.

Owl Rock initially chose to work with another Microsoft Dynamics 365 partner but learned quickly that they were not getting adequate support and clarification on the items that mattered most for their business. They thoroughly vetted several Microsoft partners and ultimately selected PowerObjects as their Dynamics 365 partner.

“What sets PowerObjects apart from other Microsoft vendors is their collective knowledge base, as well as their ability to truly understand a company's wants and needs and then engineer solutions that deliver on them,” says Michael Grande, Chief Technology Officer at Owl Rock.

Dynamics 365 for Customer Engagement

The next challenge for Owl Rock was to transform its relationship management capabilities with thousands of Financial Advisors across the U.S., while at the same time gaining the ability and power to make data-driven, real-time decisions with robust sales and activity reporting. Dynamics 365 for Customer Engagement made it all possible.

Owl Rock has a small support team – about 20 people – who need to manage nine sales territories in the U.S. with 5,000-10,000 Financial Advisors each. That's 60,000+ contacts the support team must regularly contact, sell to, and manage – not an easy task without a customizable and high-functioning CRM.

“Dynamics 365 has really helped us automate our internal processes. With so many Financial Advisors to communicate with, it's cumbersome to send personalized emails one by one. Dynamics allows us to send personalized emails to large groups. It probably saves each of us a couple hours every single day,” says Mike Iosebashvili, Internal Wholesaler at Owl Rock.

With that many Financial Advisors buying and selling every day, real-time and dynamic reporting capabilities are critical. Once again, Dynamics 365 proved up to the challenge. Iosebashvili says, “We needed to aggregate a lot of data in



OWL ROCK'S MAIN DRIVERS FOR IMPLEMENTING DYNAMICS 365 WERE THEIR NEED TO BETTER TARGET, PRIORITIZE, AND SYSTEMATICALLY MANAGE ALL THEIR CONTACTS, AS WELL AS EXPAND AND STREAMLINE THEIR REAL-TIME REPORTING CAPABILITIES. TEAMING WITH POWEROBJECTS GAVE THEM A PARTNER WHO COULD DELIVER ON BOTH OBJECTIVES.



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"The most important aspect of PowerSuccess is having one individual from PowerObjects work for our company. He knows how we work, how we function, he knows what our wants and needs are. He is part of Owl Rock. PowerSuccess is worth its weight in gold."

MICHAEL GRANDE
Chief Technology Officer
Owl Rock Capital Partners

SOLUTION |CONTINUED|

one centralized location. Each day, a territory has 5,000 to 10,000 advisors they contact and sell investment products to, and it's just not efficient to keep all that activity in spreadsheets. We needed a centralized location. Lots of data is entered for each contact, and having a centralized location is incredibly helpful and efficient."

PowerBI and Dynamics 365

Owl Rock has been able to separate themselves from their competition by using Power BI alongside Dynamics 365. In the crowded and competitive asset management industry, it is critical for companies to have real-time insight into the activities and successes of their field agents. Many companies, including Owl Rock before working with PowerObjects, struggle to manage dozens or even hundreds of spreadsheets and reports generated from several different systems. Power BI simplified everything.

"Power BI allows us to not only cross reference a multitude of data points between different reports that we can pull within Dynamics, but it allows us to automate the reports, as well," says Amy Tran-Balbin, Vice President at Owl Rock. "So, we get a live feed and every time the information refreshes within our CRM, it feeds through in Power BI. We no longer have an individual, like me, exporting and manipulating the information with a million pivot tables."

The reporting capabilities afforded by Power BI truly make the difference for Owl Rock. "I attribute our success with Microsoft Dynamics to the ability we now have to run reports through Power BI," says Grande. Robust reporting isn't the lifeblood of every organization, but when it is - as with Owl Rock - Power BI is an absolute must.

Another differentiator for Owl Rock is that by integrating Dynamics 365 with Power BI, all their systems are perfectly connected. Some of Owl Rock's competitors who use Salesforce have also adopted Power BI, but Grande believes his company still has the advantage because - since Dynamics 365 and Power BI are both Microsoft products - the integration is perfectly seamless. As Grande says, "It puts us ahead of our competitors because everything is under one umbrella. We use Dynamics 365, we use Power BI, we use the Azure cloud. It just all works together."



CHALLENGE

Owl Rock's initial challenge was to merge thousands of Financial Advisors into a single CRM platform. Next, they had to solve challenges related to metrics and reporting, as well as cohesively integrate and manage more than 60,000 business contacts.

SOLUTION

Dynamics 365 was an easy sell once everyone experienced its ease, intuitiveness, power, and potential. PowerObjects' partnership with Owl Rock focused on combining Dynamics 365 for Customer Engagement with Power BI, several PowerPack Add-ons, and PowerSuccess.

BENEFITS

- + Add-ons like Power Email, PowerMailChimp, and PowerScore enable a team of 20 to effectively manage 60,000 Financial Advisors
- + With PowerSuccess, their dedicated systems engineer's depth of knowledge about Owl Rock systems allows for real-time, proactive enhancements to CRM
- + Simplified reporting with Power BI means quicker and more effective decision-making

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PowerSuccess: The Key to Growth

As stated earlier, Owl Rock struggled with a lack of support from their previous Dynamics partners. When they sought customizations, they were usually told “can’t be done.” What they wanted was a partner invested in growing Owl Rock, willing to learn not just their system needs, but their organizational opportunities and challenges, as well. They wanted a partner dedicated to the success of Owl Rock. They wanted PowerObjects.

The PowerSuccess program gives organizations a dedicated resource, which means requests aren’t going to a blackhole that doubles as a generic mailbox – instead, they go directly to their dedicated systems engineer. In Owl Rock’s case, the contrast between their PowerObjects system engineer and their prior partner is startling. “What’s extremely refreshing about PowerSuccess in general, and our dedicated resource specifically, is that when we propose something, the response is always, ‘Hmmm... let me think about that.’ Then, later the same day, he’ll call back to say, ‘I have a solution. It can be done. Here’s how.’ Given what we were used to, that is just amazing,” says Tran-Balbin.

Owl Rock considers PowerSuccess an integral component of their relationship with PowerObjects because a dedicated system engineer affords them the luxury of having someone at PowerObjects who is as familiar with the goals, opportunities, and challenges of their organization as anyone on the Owl Rock staff. As Grande says, “The most important aspect of PowerSuccess is having one individual from PowerObjects work for our company. He knows how we work, how we function, he knows what our wants and needs are. He is part of Owl Rock. PowerSuccess is worth its weight in gold.”

A Treasure Trove of Add-ons

The asset management industry is highly competitive, so the ability to operate leanly is a tremendous advantage. Utilizing PowerObjects’ PowerPack add-ons for Dynamics 365 has helped Owl Rock streamline and simplify their operational processes, meaning that even as they add more people to their team of Financial Advisors, they’re able to continue supporting and managing the growing team with the same 20 people.

“The PowerPack add-ons have allowed us to customize Dynamics 365 to meet our unique needs, and that means we can continue to work with a leaner team and maximize our impact and efficiency. At the end of the day, having a large team in this environment is highly costly. Our competitive advantage is that with Dynamics 365 we can do it with a smaller team and be leaner and meaner,” says Tran-Balbin.

Owl Rock started by integrating PowerMailChimp, which completely transformed their insight into email views, opens, and clicks. With PowerEmail, they’re now able to send personalized messages – in bulk – to their contacts in a fraction of the time it once took. PowerMap lets them plot entire marketing lists onto a map and efficiently assign contacts to field reps. Next, they plan to explore the functionality of PowerScore and PowerPhone to see how they can leverage them to help their sales and marketing teams. As Tran-Balbin says, “I tell my team all the time, PowerPack is like unlocking a treasure every single time!”



“Dynamics has been very instrumental in helping Owl Rock grow as an organization. It’s a system that we use every day, and as our sales grow, CRM has grown, as well. We’ve raised meeting counts, call volume, and incoming sales by wide margins as the CRM has grown, so I think it’s been very intricate in the growth of the company. From an efficiency standpoint, we’re not worried about aggregating data from 50 different spreadsheets. We’re able to work off one system, which really lets us just do our jobs.”

Mike Iosebashvili
Internal Wholesaler
Owl Rock Securities



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The PowerObjects Partnership

Owl Rock needed a partner who understood the unique technology needs of a financial services company. While organizations across all industries need CRM, there are certainly subtle (and sometimes not-so-subtle) differences in the needs of each industry, and financial services is no exception. With PowerObjects' expertise in Dynamics 365, capabilities around the Microsoft suite of intelligent business applications, and experience in the financial services sector, Owl Rock knew they had found the right partner.

"The top reason I would recommend PowerObjects to another financial services firm is the fact that the company and its engineers really understand the unique needs of a financial organization like ours," says Tran-Balbin. "The engineers at PowerObjects are truly empowered to come up with their own solutions. I haven't seen that anywhere else."

The partnership with PowerObjects allowed Owl Rock to expand and enhance their relationship management and reporting capabilities, giving them a strong competitive advantage in their crowded marketplace. As Grande says, "I can't say it enough: PowerObjects knows Microsoft Dynamics. They'll set you up with somebody who knows your system, your field, and your industry. They've helped us grow our organization." Tran-Balbin adds, "I have been extremely impressed by the caliber of the individuals at PowerObjects."



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