

## Challenge

1. There are many contacts in Mainland team but few manpower, which makes it difficult to manage and distribute to different teams
2. Excel & outlook are not effective enough to manage the massy data
3. There is an issue of Contact privacy

## Project Objective

1. To manage the sales process, Limited partner (LP) & opportunities more systematically
2. To have a single view of the performance of funds
3. To allow different teams will create their own contacts without sharing to other teams

## Products

Sales cloud x 10  
Force.com x 300

## Countries Covered

HK Private Equity & Real Estate  
Mainland BD team

## No. of Business Users

*B2B, Principle Investment committee & top management*

## Business Benefits

1. Can effectively monitor opportunities stage
2. Can manage the contact information and contracts
3. Single view of same account for different investment items and different funds is possible
4. Sharing contacts to only teammates exclusively is enabled
5. Can leverage the usage for Internal process

## Further Plan

Travel expense  
Adoption in mobile