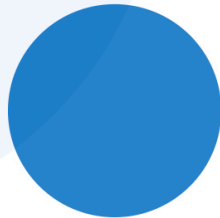




Customer Success Story

Customer Satisfaction Rating:



PEREGRINE
CAPITAL



Capitalising with Salesforce

Better Visibility, Data management and relationship mapping



CUSTOMER OVERVIEW

Peregrine Capital is South Africa's longest running hedge fund manager and is focused on delivering superior, consistent risk adjusted returns for long term investors, using high conviction portfolios, based on in depth, proprietary bottom-up research

CUSTOMER COMPANY PROFILE

LOCATION:	South africa – Johannesburg and Cape Town
EMPLOYEES:	10 - 50
INDUSTRY:	Fund Management, wealth and asset management
Solution(s):	Financial Services cloud, Sales Cloud
GO LIVE DATE:	09/06/2020

Challenge	Solution	Results
<ul style="list-style-type: none"> Peregrine Capital manages their customer database in an external system which is controlled by an external company, and also the financials are managed by another external company. They have no visibility of their 360 view of the client and related finances. Monthly they receive a CSV sheet of any new clients or updated information of existing clients. Peregrine Capital currently does not have any system to store their client data that comes from external companies. All the data is managed in an Excel sheet for Peregrine. Peregrine Capital needs a better way to view their B2B and B2C clients of all sizes and formats and streamline the ways of relationship management. 	<ul style="list-style-type: none"> Financial Service Cloud through Sales Cloud Solution of financial service cloud through Sales Cloud will enhance operational visibility, data management and relationship mapping of their clients. It will provide the ability to view the financial accounts of their customers and the B2B to B2C relationship experience. 	<ul style="list-style-type: none"> By implementing the Financial cloud across the organization, Peregrine Capital expects to have a significant view of their 360 view of the customer from the B2B to B2C in a clear visual way and see the related financials and relevant important information. Moving Peregrine Capital to Sales Cloud ensures that the fulfillment of the sales process and data management is managed in a significant manner. Excels are eliminated, duplication of activity is removed. Time was saved by having activities automated and the manual way of work was eliminated. Better reports are extracted.