



Growth Equity Investment Firm Reduces Costs by Integrating Salesforce CRM with Microsoft SharePoint CMS

The Company: ABS Capital Partners

Founded in 1990, ABS Capital Partners (ABS) is an American growth equity firm focused on investments in companies across a range of industries, including business & tech-enabled services and health care. The firm has raised approximately \$2.5 billion since inception across eight funds.

Situation

There is an increasing need for financial capital companies to stay attuned to latest technology trends and use best of breed cloud software platforms to efficiently and effectively optimize their organizational business needs. They are, at the same time finding the need to transfer content and data amongst these disparate and disconnected cloud platforms. For ABS, there didn't seem to be an easy way to do this without spending enormous amounts of money to bring in a specialist for each individual system. Fortunately, modern cloud services with the Microsoft cloud and content services stack facilitate capabilities to connect these systems to allow access to information needed from their cloud software platforms. ABS, who is focused on helping organizations by providing growth capital, had to connect their Salesforce CRM which contained vital secure client information to their Office 365 SharePoint Online cloud document management platform where they stored related client documentation and metadata. Creospark, a Microsoft Partner, was tasked with integrating these systems in a fashion where source system data and documents would be accessed from each system to increase employee productivity and ease of use.

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Industry:

Financial Services

Technologies

Azure
Office 365
SharePoint
Salesforce

Challenge

With a significant portion of ABS's workforce constantly updating account and deal data within their CRM, it was vital that there would be a seamless experience derived from the CRM for accessing documents and related content for collaboration within their SharePoint Online platform. Furthermore, it was a tedious process to update both systems with account and deal information. Ancillary benefits anticipated by engaging in this project was a reduction in operational costs for storage of customer related documents in the cloud.

Solution

ABS selected Creospark as their systems integration partner due to an existing partner relationship and expert qualifications. Working together to define requirements, as well as selecting the best in class Microsoft enterprise cloud-based middleware, workflow tools and content service technologies, the team derived an implementation plan as well as a technical design for the best solution to meet the company's needs and reduce operational costs.

Creospark designed a solution that eliminated the need to manually transfer account and deal data to SharePoint from Salesforce. Once in SharePoint, Microsoft Flows would be initialized to perform further refinement on library content and data based on business requirements. Furthermore, this solution would enable capabilities to open up document sets in SharePoint Online Document Libraries directly from the Salesforce CRM interface with the appropriate security being added on the SharePoint libraries.

The solution involved using the following components:

- Modern Cloud Content Services such as SharePoint Online and Microsoft Flow within the Microsoft Office 365 stack for document management and workflows to meet business requirements.
- Security and Compliance management for auditing and information protection.
- Microsoft Azure App Services to facilitate triggered metadata transfer from the Salesforce CRM environment to the Microsoft Office 365 SharePoint Online environment.

Results

As a result, ABS reduced operational costs on the manual transfer of account and deal related metadata on both systems. There has also been significant savings on the costs of document management by using their existing Microsoft Office 365 SharePoint Online Document management system which provides an ample amount of space with the subscription. Furthermore, they are now in the process of satisfying their governance policies of storing relevant account and deal related documentation within SharePoint Online document sets and making their workers more productive by automating workflows in SharePoint Online by using Microsoft Flow.

ABS is now expanding its adoption of Microsoft Office 365 and Azure in terms of security and compliance as well as workflows within SharePoint Online given the cost savings benefits and the fact that most of these services needed are included within their existing Office 365 subscriptions.

