

HSO Win Wire: A "Mutual Maturing" Wins a Repeat Client from PwC for a \$2.8M FastTrack Transformation from AX to D365 Finance & Project Ops and HSO's DynAd

Geo:	USA
Industry:	Financial Services
Vertical:	Hedge Fund
Solution:	D365 Finance D365 Project Ops
Sales Play:	Optimize Finance & Operating Models
Date Closed:	March 2022
Won Against:	Concur (proposed by PwC and Avanade)
MSFT Deal Size:	\$171,000 year 1 \$196,000 year 2
Replaced:	D365 AX

Customer Situation & Goals

- Warburg Pincus is a leading global growth investor with \$80B+ AUM and has raised 21 private equity funds, which have invested \$100B+ in 1,000+ companies in more than 40 countries.
- HSO implemented AX and HSO's DynamicsAdvantage (DynAd) for Multi-Entity Management in 2015. This solution was further customized to fit the specific requirements, which extended the original timeline and budget; however, the solution proved itself as a 'workhorse' with very few issues over its 6+ years in production.

Solution

- As they planned for a ground-to-cloud transformation (AX was no longer supported), Warburg chose PwC for the migration to D365. **PwC evaluated DynAd and verified it was "best in class"**; however, Warburg wanted an "out-of-the-box" solution with few customizations. PwC evaluated other options but could not find a superior solution, so the firm kept DynAd and began working again with HSO.
- Originally, HSO engaged alongside PwC for DynAd migration only. As we worked with Warburg on that, the firm realized that, like them, we had matured and could better lead the full D365 migration effort vs. PwC, giving them "the best" once again.
- **The firm signed a \$2.8 million SOW**

Co-Sell & Field Insights

- The quality of DynAd was key to making this sale.
- HSO was able to meet Warburg's objective of minimizing customizations and leveraging as much out of the box functionality as possible, while still delivering key requirements unique to Warburg's complex processes.
- Moving to D365 was a major move for Warburg as they continue their global ground-to-cloud transformation and AX being one of their core solutions to modernize.

Why We Won

Warburg selected **Dynamics 365** and **HSO** based on:

- Their past experience with AX was positive.
- The quality of HSO's DynAd solution was praised by PwC as "best in class."
- HSO demonstrated the ability to collaborate as an expert advisor.
- Both D365 and DynAd had made significant improvements, which made this a less customized solution.
- Warburg had an excellent experience with HSO China, so they felt comfortable with HSO's global capabilities.

HSO Team



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