

# How Direction Software LLP helped a Leading Holding Firm ward off complexities with Microsoft Dynamics NAVERP Solution



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**DIRECTION**  
Software LLP

## The Client

A leading capital markets firm and a holding entity, the client offers the most comprehensive and cost-effective financial solutions to multiple subsidiary companies that span across the globe. Recognized for its diversified business portfolio, the company's holistic suite of offerings include retail loans, sale and distribution of financial products as well as project advisory services to a wide customer base. With an aim to drive greater business value through its financial offerings, the client constantly strives to meet the growing demands of its existing and potential customers.

## The Bumps on the Road to Success

With its business growing from strength to strength, the company wanted to keep pace with the rising loan transaction volumes. However, there was a hiccup in the company's growth story; lack of an automated and integrated financial system took a toll on the company's productivity and profit margins. The firm did not have access to real time information as well as advanced analytics and hence was not able to get a 360-degree view of its balance sheets and customers' data. Disparate systems added to more complexities, lead to duplication of efforts and made the evaluation process of Management Information System (MIS) data more cumbersome.

## The Solution: Overcoming the Gridlock, the Direction Software LLP way!

The financial services company was looking for a more robust way to streamline the loan management system, which in turn, would enable them to deliver a faster response to end customers. After evaluating various loan management systems, the company zeroed in on Microsoft Dynamics NAV 2013 R2--a global enterprise resource planning (ERP) software solution that has helped more than 100,000 companies worldwide manage their accounting and finances, supply chain, and operations. The company was looking for a partner who could understand their business objectives, manage the overall ERP implementation process and streamline their disparate processes under a single architecture. With its proven expertise in ERP solutions, Direction Software LLP seemed to be the perfect choice. The implementation was carried out in a well-planned and phased manner so that the benefits of ERP start showing results quickly.

## Executive Summary

### Client

A leading capital markets firm and a holding entity.

### Industry

Financial Services

### The Challenge

Lack of an automated and integrated financial system took a toll on the company's productivity and profit margins.

### The Solution

Microsoft Dynamics Nav 2013 R2, a multidimensional global ERP software solution, helped in streamlining the loan management system.

### Technology Used

- Microsoft Dynamics NAV 2013 R2
- SQL Server 2012

### The Benefits

- Streamlined loan management processes and systems.
- Automatic Bank Reconciliations helped reduce costs.
- Better cost control, access to real-time data, better and informed decision making  
Provided real-time supply chain visibility.

## The Prime Benefits Achieved

The ERP solution fitted the requirements of the company to the T. Here's a ringside view of the direct benefits achieved by the company:

- The loan management operations and processes of the firm have been streamlined; procurement processes have been automated.
- Bank Reconciliations are performed efficiently and accurately and this helps to reduce overall administration costs.
- The client is now able to get a 360-degree view of its business operations. This has led to better cost control, access to real-time data, better and informed decision making.
- Integration with IDBI and HDFC bank now helps the client to process the payments in a systematic manner.

## About Direction

We are a software services firm, specializing in developing & implementing Internet strategies for businesses & providing high-end software development services including Custom Programming & Offshore Development.

With 17,000 sq. ft. of space in a modern building in central Mumbai the hub of all business activities in Mumbai, Direction is fully equipped with state of the art infrastructure and networked with redundant 6 MBPS dedicated internet access from different providers.

Our vision is to be a trusted IT partner, leveraging our knowledge of tools and technologies to provide simple, integrated and innovative solutions that result in maximum customer satisfaction.



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