Dynamics 365

For Financial Services

Service Description

The ANS Power Platform and Microsoft Dynamics 365 for Financial Services solution empowers financial organisations to reimagine the way they attract, onboard, engage, and support clients. Built on the trusted and scalable Microsoft ecosystem, this service unifies client data, interactions, financial information, and operational processes into one intelligent digital platform, giving teams everything they need to deliver exceptional, timely, and compliant client experiences.

From advisers and brokers to relationship managers and service teams, everyone gains a modern toolkit that streamlines day-to-day activities, drives operational efficiency, and frees them to focus on meaningful, high-value engagement. With automation built in, the platform reduces friction at every stage of the client journey, ensuring rapid onboarding, consistent service quality, and a strong compliance posture.

By bringing together real-time insights, powerful workflow automation, and data-driven decision-making, organisations can improve customer satisfaction, accelerate growth, and establish a resilient digital foundation that evolves with the needs of their clients and their business.

Service Features

Unified Client Profile

A single, comprehensive view of each client that consolidates all interactions, financial information, risk indicators, communications, and servicing history. Teams can instantly access accurate, up-to-date data, supporting personalised conversations and more informed decision-making.

Automated and Compliant Onboarding

Digitised onboarding processes streamline data gathering, identity checks, approvals, and compliance requirements. Automated KYC and AML workflows reduce manual effort, improve accuracy, and ensure clients move through onboarding quickly without compromising regulatory standards.

Case and Request Management

A centralised system that captures every enquiry, request, and issue, ensuring full visibility from creation through to resolution. Automated routing, prioritisation, and escalation help teams respond faster and maintain consistent service levels across all channels.

Personalised Client Insights and Recommendations

Intelligent analytics reveal client behaviour, preferences, potential risks, and emerging opportunities. The platform suggests next-best actions, prompts timely follow-ups, and supports advisers in delivering proactive, personalised engagement.

Relationship Management Tools

Purpose-built capabilities for advisers, brokers, and wealth managers, including activity tracking, communication planning, pipeline visibility, and portfolio management. These tools help strengthen long-term relationships and support strategic client development.

Integrated Compliance and Audit Controls

Every action, approval, and interaction is recorded with full traceability. Embedded regulatory controls and automated processes help organisations manage compliance consistently, reduce risk exposure, and maintain audit readiness at all times.

Real-time Dashboards and Reporting

Dynamic dashboards give leaders and frontline teams immediate insight into client health, service performance, operational metrics, and emerging trends. This enables quick, confident decision-making and drives continuous improvement across the business.

Project Management and Programme Design

Structured templates and tools support programme planning, delivery oversight, milestone tracking, and governance. These capabilities ensure transformation initiatives stay aligned to strategic goals and are delivered successfully.

Seamless Integration with Microsoft Technologies

Native connectivity to Microsoft 365, Azure, Teams, and other core systems ensures consistent user experiences, secure data flow, and reduced duplication, creating a fully connected digital ecosystem.

Built-in Security, Compliance, and Governance

Security, data protection, and governance are embedded at the core of the platform. Organisations benefit from enterprise-grade controls, ensuring data integrity and safeguarding sensitive financial information.

End-to-End Workflow Automation

Low-code automation capabilities streamline repetitive tasks, eliminate manual handoffs, and optimise operational processes. This drives efficiency at scale and empowers teams to spend more time on high-value client engagement.

Service Benefits

Stronger Client Relationships

With a complete view of every client's goals, interactions, and history, advisers can engage more meaningfully, deliver personalised advice, and strengthen long-term trust and loyalty.

Faster Onboarding

Streamlined digital workflows enable quicker client setup with reduced administrative delays, creating a more positive first impression and accelerating time to revenue.

Reduced Compliance Risk

Automated controls and transparent audit trails help ensure regulatory obligations are met consistently, reducing complexity and minimising compliance-related exposure.

Improved Case Resolution

Structured processes and unified tools allow teams to respond to requests and issues more quickly and effectively, enhancing client satisfaction and maintaining service quality.

Greater Customer Retention

Proactive servicing, predictive insights, and personalised engagement help organisations anticipate needs, address concerns early, and strengthen loyalty.

Increased Operational Efficiency

Automation and standardised workflows reduce manual effort, accelerate productivity, and ensure teams can focus on strategic, value-adding tasks.

Better Risk Oversight

Real-time risk insights and behavioural analytics empower organisations to identify challenges sooner, act quickly, and maintain a strong risk management posture.

Enhanced Cross-Sell and Upsell Opportunities

Data-driven recommendations help teams identify relevant opportunities for each client, supporting revenue growth and more tailored service offerings.

Enterprise-wide Visibility

Leaders gain a holistic view of pipeline performance, client health, service metrics, and operational trends, enabling smarter planning and more informed decision-making.

Rapid Time to Value

Low-code tools and accelerator-based deployment approaches ensure organisations can modernise quickly, adapt rapidly as needs evolve, and realise value sooner.

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Why Choose ANS?

Partnering with ANS gives you more than a technology solution, you gain a strategic partner committed to helping your institution achieve long-term transformation and measurable value.

What ANS delivers:

Financial Services Expertise

ANS has deep experience supporting financial organisations with secure, scalable digital solutions that meet the demands of a highly regulated environment.

Proven Delivery Frameworks

We bring established best-practice methodologies, accelerators, and templates that reduce deployment time, lower risk, and drive consistent outcomes.

End-to-End Partnership

From discovery and design to implementation, optimisation, and ongoing support, ANS provides a full lifecycle partnership to ensure long-term success.

Secure and Compliant by Default

Security, governance, and regulatory compliance are built into every solution we deliver, giving financial organisations confidence and peace of mind.

Outcome-Focused Approach

Our solutions are designed to deliver measurable results, improved efficiency, enhanced customer satisfaction, reduced risk, and stronger commercial performance.

Scalable Low-Code Innovation

With extensive expertise across Power Platform and Dynamics 365, we empower organisations to innovate quickly, scale confidently, and evolve their digital services continuously.