



JEGI expands reach and increases efficiency with Infor CRM in the cloud

Facts at a glance



Headquarters
New York



Industry
Financial Services & Insurance



Products and services
Infor® CRM



Implementation partner
Infinity Solutions



Web site
jegi.com

Gaining one view of the customer

For more than 28 years, JEGI has been the leading independent investment bank for the global media, information, marketing, software, and tech-enabled services sectors. Headquartered in New York, with offices in Boston and London (through its partnership with Clarity), JEGI has completed more than 600 high-profile merger and acquisition transactions serving global corporations, middle-market and emerging companies, entrepreneurial owners and founders, and private equity and venture capital firms.

Companies and markets change quickly, and JEGI needed to stay on top of key executive changes, new market entrants, and new business developments. With thousands of companies to track in the markets it serves, the company needed a centralized database that showed an up-to-date executive team, ownership/ investor groups and the most recent communications with companies and contacts. Having one source of the truth regarding customer interactions and data is critical to JEGI's business model, where several team members work together across engagements and industries.

After a careful analysis of the CRM market, JEGI reviewed several CRM options that would fit its business model and size. JEGI chose Infor CRM as the solution that best met its needs. JEGI saw Infor CRM as the best fit to better track the companies and contacts it communicates with for marketing and business development purposes.

Business goals

- Allow data sharing and a cohesive, up-to-date, accurate view of customers.
- Efficiently track key executive changes and new market entrants.
- Execute searches more efficiently and build lists faster.
- Save employee time with better functionality and improved overall business efficiency.



Infor CRM in the cloud is an upgraded version of the platform we had been using, which made the migration, implementation, data transfer, and team training seamless. The key reason we selected Infor CRM in the cloud was because it required less training and allowed an easier implementation.”

Adam Gross, Chief Marketing Officer, JEGI



Migrating to the cloud for better functionality

Reducing training and making implementation easier

JEGI decided to upgrade to Infor CRM in the cloud because it offered greater flexibility and could be accessed from any computer or mobile device—in the office or on the road. Because Infor CRM is an upgraded version of the platform JEGI had already been using, the migration, implementation, transfer of data, and team training was seamless—which meant less time and fewer resources were needed.

Because Infor CRM makes it easier and faster for employees to complete searches and build lists, it offers greater asset and employee utilization. Infor CRM also offers significant efficiency gains and can save time thanks to the improved functionality of its new release, which includes a Microsoft® Outlook® plug-in and mobile access.

Business outcomes

- Increased and improved communication between bankers.
- Saved time creating lists of invitees for conferences and events.
- Expanded reach to potential clients without adding headcount in research and business development.
- Gained access to the database from any location on any mobile device or computer.

Saving significant resources

With Infor CRM, JEGI has improved communication significantly between bankers regarding client prospects and buyers.

In addition, JEGI has experienced significant efficiency gains and can create lists of invitees for conferences and events faster, and has an expanded reach to potential clients, without adding headcount in research and business development. At JEGI, users particularly like the notes and group filtering features in the web version of Infor CRM, the Outlook integration with Xbar, and mobile access.

With Infor CRM, JEGI continues to be able to operate with fewer resources. Infor's improvements to the solution's functionality, look-and-feel, and out-of-the box functionality allowed JEGI to migrate seamlessly to the cloud. And, Infor's support team is very responsive and friendly, making JEGI's implementation, data transfer, and team training a smooth experience.

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With Infor CRM, we have one source of the truth regarding customer data and interactions with a company, and we've seen significant improvements in efficiency gains and time savings due to the better functionality of the new Infor CRM cloud version.”

Adam Gross, Chief Marketing Officer, JEGI



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