

# Customer Testimonial



„All of our requirements and concerns were very well reflected, processed and fulfilled. The solution is a real benefit for us.“

## PMG Fonds Management AG

- ✓ **Industry**  
Finance
- ✓ **Employees**  
40
- ✓ **Services**  
Tailor made investment solutions for institutional customers
- ✓ **Business Challenges**
  - Many complicated regulations in the industry which must be considered
  - Growing base costs due to the steady growth of the company
  - New back office solution needed
- ✓ **Contact**  
[www.pmg.swiss](http://www.pmg.swiss)

## The Project at a glance

- ① **Initial Situation**  
PMG is looking for a holistic HR solution based on Microsoft technology which offers possibilities of adjusting and automating.
- ② **Specific Challenges**  
The growth of the company makes it necessary to establish structures in the HR area and automate processes.
- ③ **Solution**  
HR for Dynamics replaces previous stand-alone solutions, relieves from administrative tasks and structures the HR area.
- ④ **Benefit**  
PMG is able to keep on working comfortable in the well-known Microsoft environment and save a lot of time for administrative tasks.
- ⑤ **About the cooperation**  
„All of our requirements and concerns were very well reflected, processed and fulfilled“.

## → Vision

Right now, PMG Fonds Management AG is one of the few independent fund management companies in German-speaking Switzerland. This independence is very important for the company as well as providing all of the relevant services personally and regional in Switzerland. PMG's aspiration is to always react to the individual requirements of their customers and fund initiators and at the same time meeting highest quality demands/requirements. An additional goal of the company is the steady growth of the company.

## → Specific Challenges

The constant growth of the company requires a new solution in the HR area. Currently, administrative tasks are mapped via Word forms, Excel tables and a few Sharepoint solutions, which require constant further development. An area with potential for improvements is for example employee reviews: reviews are happening/do take place but therefore, Word documents are sent manually via e-mail and there is no regularity or structure for conducting and tracking the reviews. PMG's goal/aim is to create such structures in HR via a new HR solution to improve the administration also via automation.

Additionally, the company was looking for a holistic HR solution which is based on the Microsoft platform and can be easily adjusted from the own IT. Finally, the cultural proximity was an issue for PMG.

„We will definitely benefit from HR for Dynamics when it comes to administration.“

Raoul Dobal, COO, PMG Investment Solutions



## → Solution Approach

HR for Dynamics is a holistic complete solution for HR which is based on a Microsoft platform and thereby fulfills the most important requirement of PMG. Due to HR for Dynamics, HR and Managers can be relieved from administrative tasks: a comfortable self-services portal enables employees to easily maintain a lot of data themselves and automated workflows create structure in the HR area. For example, managers are regularly reminded to conduct employee interviews and existing templates reduce the organizational effort which is required for reviews. This means that there is more time and focus left for the really important topic - the employees. Hubdrive, the manufacturer of HR for Dynamics, has its headquarters in Germany and this means that they are culturally very close to PMG in Switzerland. Many Swiss country-specific topics in the HR area are already included in the standards of the solution.

## → About the cooperation

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## → Benefit

Due to HR for Dynamics, PMG gains comfort and saves a lot of time. All island solutions/IT islands like Word- or Excel documents are replaced with one single solution. With HR for Dynamics, PMG creates structures in the HR area and automations ensure/secure workflows as well as the currency of data.

Significant productivity gains can be achieved across all employees for PMG. Not only by using self-service functions but also by administration of employees without access to the system, the effort/workload for administrative HR tasks for supervisors/managers can be reduced significantly. Overall, significant productivity gains, clearer processes and thus efficient handling of recurring HR processes were implemented. This frees up valuable and specialized human resources.



Schedule an Online Demo with  
HR for Dynamics experts.

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