



# **EFFORTS SOLUTIONS**

— IT TECHNOLOGY & SOLUTIONS —

SINCE 2009

## **DIGITAL TRANSFORMATION M365**

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# Centre of Excellence Expertise

Powering the Future of Enterprise Collaboration,  
Migration & Digital Workplace Transformation.

- Microsoft Dynamics 365
- Microsoft SharePoint
- Microsoft PowerBi
- Ai/ML Intelligence
- Robotic Process Automation
- Use Cases
- Managed Services



## EXPERTISE AREAS



# Microsoft Dynamics 365 - Expertise



## Discovery / Requirements analysis

- Analysis of the current business requirements through product led workshops
- Fit-Gap analysis of requirements and product capabilities
- Assessment of an optimized solution
- Business requirements documentation covering business processes, workflow, data sources and integrations



## Solution design

- Define the business process flow to enable an efficient solution design including re-engineering of existing business processes as needed
- Design the solution covering business, data, security, performance, localization, compliance requirements
- Integration centric solution design for multi-product strategy



## Development / Build

Build solution with a combination of product configurations and technical development covering.

- Product Configurations
- Functionality enhancements
- Integrations
- Workflows and Reports
- Hybrid agile methodology



## Testing

- Test strategy and governance
- Unit Testing
- Functional testing
- SIT testing
- Defects management
- UAT testing
  - UAT planning
  - Prepare scenarios for execution
  - UAT support



## Data migration

- Data migration strategy & planning aligning with organizational strategy
- Data mapping, cleanup support
- Data migration through established framework and automated scripts



## Go live support

- Production cutover planning and support
- Hypercare support for initial period of go live



## Post go live on-going support

- Issue and problem management through established ITSM framework
- Manage product updates
- Assessment and implementation of new features as per business needs

# SharePoint – Expertise

## Document Management

Enterprise Content Management solutions with automated classification and retention policies



## Enterprise Intranets

Knowledge portals and collaboration hubs that connect employees and information



## AI-Driven Services

Syntex, Copilot, and AI Builder implementations for intelligent content processing



## Process Automation

Digital workflows that streamline business processes and eliminate manual tasks



## M365 Integration

Seamless integration with Teams, Outlook, and the entire Microsoft ecosystem



## Migration Services

Expert migrations from legacy systems and file shares to SharePoint Online.



Our comprehensive expertise spans legacy system migrations, hybrid deployments, and advanced governance frameworks that ensure scalability and compliance.

# Power BI - Expertise

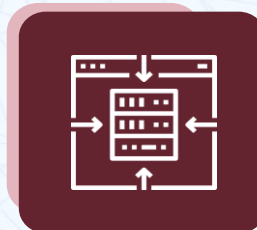
## Data visualizations

- Multi-level drill downs
- Dynamic Filtering – Business Units wise, Fund wise, Asset class wise, etc.
- Consistent theme across all reports
- Various visualization components Cards-, Graphs, Tables and other forms
- Trend Indicators



## External integrations

- DAX to achieve complex calculations
- Chain linking of data (e.g. performance return cumulation, market value cumulation)
- Calculated fields referencing multiple calculated fields
- Integration with Power Apps



## Data modelling

- Good experience in Investment Data Modelling
- Standardize data sets from different sources

## Data loading & transformations

- Data load from different sources including Excel, CSV & MS SQL
- Dynamic column creating during loading process
- Complex data transformations using Power Query

## Data quality reports

- Validations and Verifications on data
- Provides insights on data quality issues



## Strong access rights implementation

- Business Units Level
- Fund Level
- Regional vs Local level
- Department Level

# SharePoint Capabilities



## Implementation

Modern architectural deployment across all tiers



## Migration

Seamless data transition with zero integrity loss



## Governance

Robust Compliance, Security and Integration



## Modernization

SPFx driven workflows for modern workplace



**On Premise:** High security on prem servers or private cloud deployments for regulated industries



**Online:** Scalable, Cloud-native solutions leveraging Microsoft 365 ecosystem



**Subscription Edition:** Latest perpetual update model for stable enterprise environments



**Legacy to On-Premise:** Upgrade older farm versions to supported infrastructure



**Legacy to Online:** Full cloud-transformation with metadata preservation



**On-Premise to Online:** Hybrid or full migration using specialized tooling



**RBAC Permissions:** Granular RBAC configuration



**Security Audit:** Advanced Monitoring



**Migration Recon:** 100% data integrity assurance



**Integration:** Seamless integration with external systems



**Responsive, custom web parts**



**Integrated Power Automate**



**AI, Co-pilot, Enhanced UI/UX**

# End-to-End delivery framework



# Critical success factors

## Centre of Excellence Model

Structured COE approach ensures consistent best practices, robust governance frameworks, and enterprise scalability across all implementations

Adoption-focused design methodology prioritizes user experience and change management to maximize ROI and minimize resistance

## User-First Design Strategy

## Migration Automation

Proven migration playbooks and automation frameworks accelerate deployment while reducing risks and ensuring data integrity

Embedded artificial intelligence and automation capabilities transform every engagement into an intelligent, future-ready solution.

## AI Integration

## Continuous Enablement

Ongoing training programs and proactive monitoring ensure teams remain empowered and systems perform optimally.

# SharePoint Tools & Technology Stack



## Power Platform

**Power Apps, Power Automate, Power BI, and Power Virtual Agents** for comprehensive business application development and workflow automation.



## Viva & Syntex

**AI-driven** employee experience platforms and intelligent content automation that enhance workplace productivity and knowledge management.



## Azure Integration

**Logic Apps, Service Bus, and Azure Functions** providing robust cloud integration capabilities and scalable infrastructure solutions.



## Migration Toolkits

**ShareGate, Metalogix, AvePoint & custom automation scripts** ensuring smooth, efficient migrations with comprehensive data validation.



## DevOps Pipeline

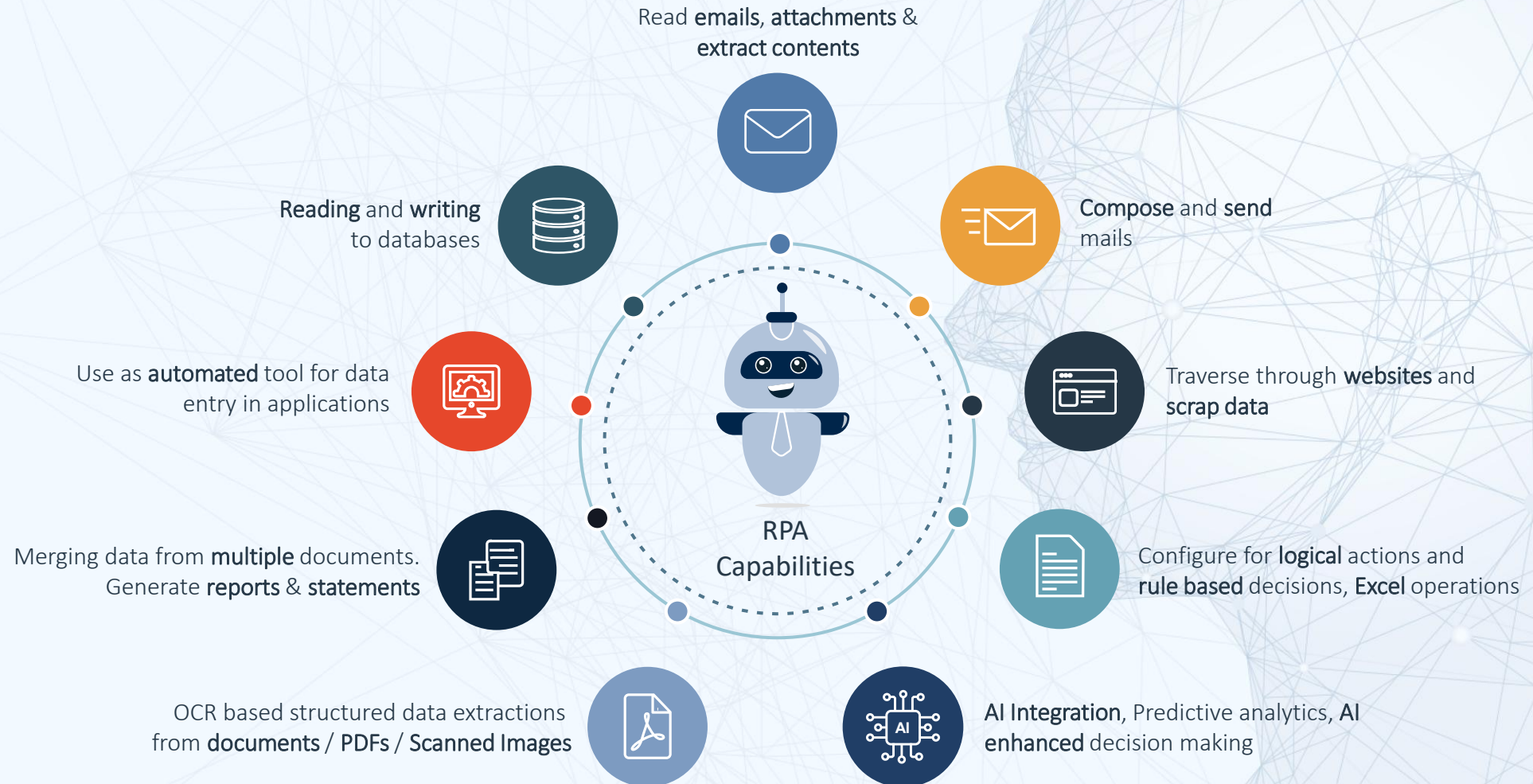
**CI/CD pipelines**, version control, and automated testing frameworks that ensure reliable, repeatable deployment processes.



## AI & Dataverse

**Dataverse and AI Builder** enabling intelligent automation across workflows with machine learning and predictive analytics capabilities.

# Typical RPA capabilities



# Our AI expertise

## Explainable AI

Building interpretable ML systems to ensure transparency, accountability, and compliance.

## Multi Modal

Develop Custom Gen AI models, Integrating text, image and audio data to provide enriched, context-aware solutions.

## Anomaly Detection

Advanced algorithms for early detection of anomaly

## Optical Character Recognition (OCR)

Fast data extraction from documents/images

## Recommendation Systems & Chatbots

Personalization of Agentic AI systems and chatbots to fit specialized requirements.

## Image Processing & Object Recognition

Leveraging advanced computer vision and deep learning techniques to detect, classify, and analyze objects within images and video streams, enabling automation, quality assurance, and intelligent decision-making across domains

## Data Visualization

Beautifying data for better decision-making

## LLM Training & Finetuning

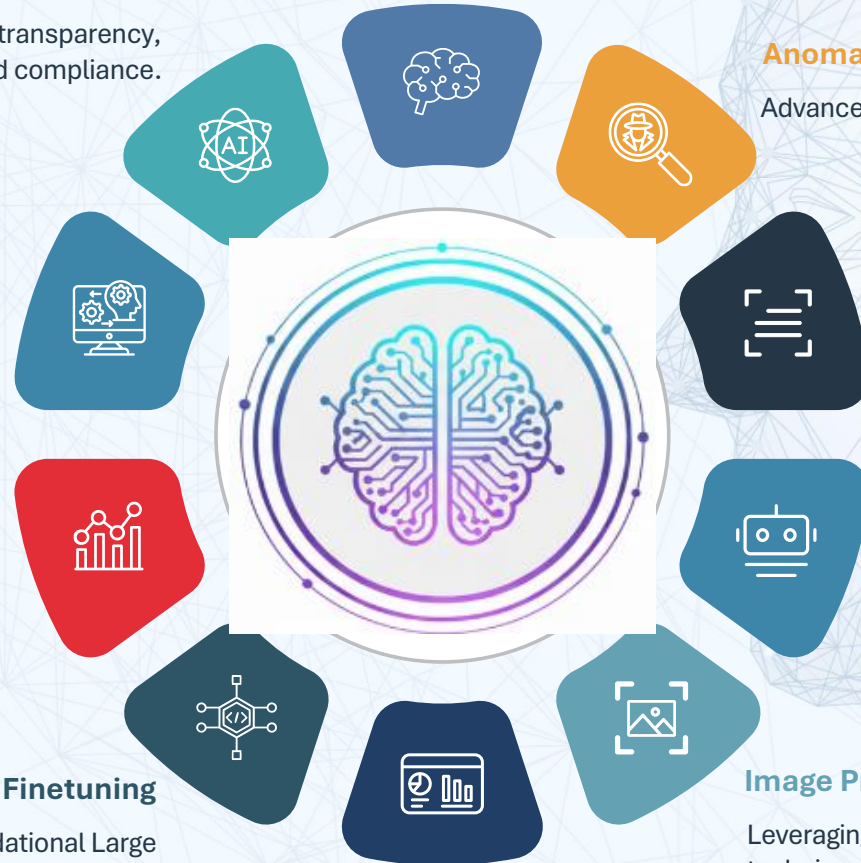
Development of domain-adapted Foundational Large Language Models through parameter-efficient fine-tuning techniques such as LoRA and QLoRA

## Predictive Analytics & Forecasting

Building time-series and causal models for demand forecasting, anomaly detection, and trend prediction

## Retrieval-Augmented Generation (RAG) & Knowledge Systems

Designing RAG pipelines that combine semantic search, vector databases, and LLMs for knowledge retrieval and contextual reasoning.



# AI Powered Solutions

Our proprietary AI products are designed to solve real-world enterprise challenges — from voice-driven commerce to secure knowledge retrieval and immersive digital engagement. Each solution is built with privacy, scalability, and measurable impact at its core.



## Voice-Based AI POS

Intelligent voice-driven point-of-sale streamlining transactions via natural language — no touch or typing required. Supports multilingual input, integrates with existing payment infrastructure, and reduces checkout time by up to 60%.



## Virtualink Engage

AI conversational intelligence with hologram support — bridging physical and digital worlds for immersive query resolution. Ideal for customer service centers, retail environments, and executive briefing rooms.



## AI Document Intelligence

Automated extraction, classification, and validation of complex documents — from contracts to invoices. Powered by custom-trained models that achieve 99%+ accuracy across structured and unstructured formats.



## Smart Workflow Orchestrator

End-to-end process automation that intelligently routes tasks, escalates exceptions, and optimizes resource allocation in real time. Reduces process cycle times by up to 70%.



## Quiriosity

Localised, private AI trained on your own documents for secure, instant knowledge retrieval — fully confidential. Deployed on-premise or in private cloud, with role-based access controls and audit trails for regulated industries.



## Conversation IQ

Monitors and scores client conversations, surfaces compliance risks and coaching opportunities to elevate service quality. Real-time sentiment analysis, automated call summaries, and integration with leading CRM platforms.



## Predictive Risk Engine

Proactive risk scoring and anomaly detection across portfolios, transactions, and operational workflows. Continuously learning models that flag emerging threats before they impact the business.



## AI Powered Client Onboarding

Streamlined digital onboarding with automated KYC/AML checks, document verification, and intelligent form pre-population. Cuts onboarding time from days to minutes while maintaining full regulatory compliance.

# RPA center for excellence

Service



RPA consulting & strategy



RPA Implementation, maintenance & support



Independent testing services



Upgrade



Value added services

Experience



Commendable automation experience



RPA Certified COE experts & trained crew



100+ processes replaced by RPA



4+ years of RPA projects delivery



Decades of Buy-side consulting & operations experience

Tool expertise



Why Efforts Solutions?



Best of breed techno-functional pool



Global presence for increased productivity



Demonstrated approach to delivery faster benefit realization

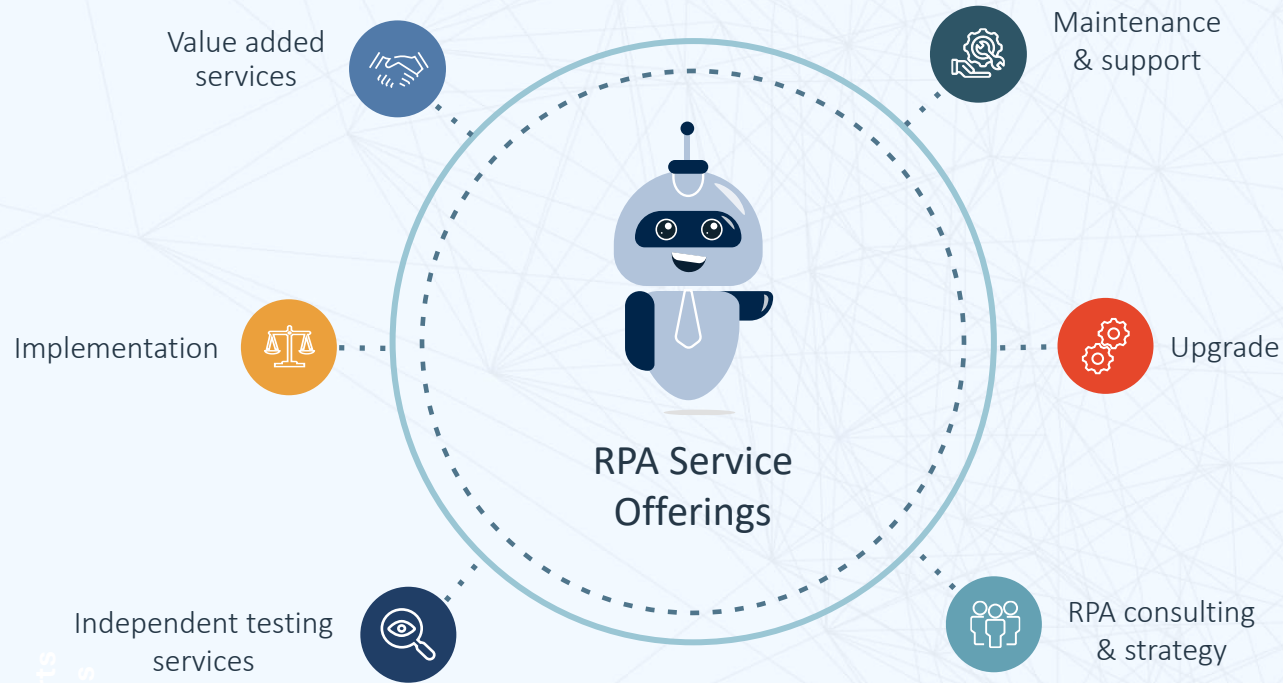


Automation innovation lab unique framework for Agile & DevOps delivery



Recognized thought leaders in finance domain

# Robotic Process Automation Service offerings



## Consulting

- Due diligence
- Advisory services
- RPA assessments
- RPA implementation strategy
- RPA tool evaluation and POCs
- Benefits analysis – realignment of processes

## Implementation

- Bot implementation lifecycle
- Support technical upgrades & maintenance
- Leverage RPA talents
- Proven agile project management for RPA projects

## Independent testing services

- Test consultancy services
- RPA enabled business process testing
- Testing in a continuous integration / continuous delivery method
- Digital assurance (mobile & analytics)

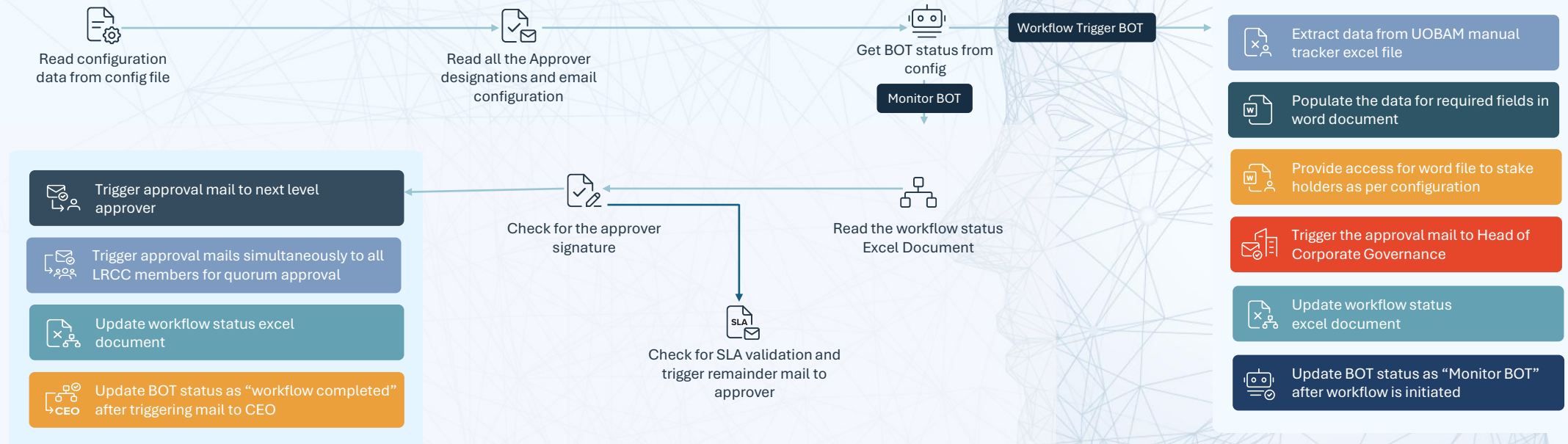
# RPA investment management processes

Applicability ● Low ● Medium ● High

	Low	Medium	High	
Front office	<ul style="list-style-type: none"><li>Dealing Process</li></ul>	<ul style="list-style-type: none"><li>Portfolio Monitoring Review &amp; Oversight</li><li>Client Services</li></ul>	<ul style="list-style-type: none"><li>AML / KYC</li></ul>	<ul style="list-style-type: none"><li>Asset Allocation Process</li></ul>
Middle office	<ul style="list-style-type: none"><li>Performance &amp; Attribution</li><li>Collections Process</li></ul>	<ul style="list-style-type: none"><li>Compliance &amp; Risk Monitoring Process</li><li>Trade affirmations</li></ul>	<ul style="list-style-type: none"><li>Process, Control &amp; Client Mandates</li><li>Transfer Agency – Non-commercial transactions</li></ul>	<ul style="list-style-type: none"><li>Cash Management Process</li><li>Transaction Monitoring Process</li></ul>
Back office	<ul style="list-style-type: none"><li>Collateral Management</li><li>Derivatives Processing – Enrichment, Validations</li><li>Pricing &amp; Valuation</li></ul>	<ul style="list-style-type: none"><li>Automated Data Management</li><li>Quality Assurance for 3<sup>rd</sup> Party Providers</li><li>Corporate Actions Processing</li></ul>	<ul style="list-style-type: none"><li>Reporting &amp; Analysis</li><li>Client / Regulatory reporting</li><li>Cash Forecasting</li></ul>	<ul style="list-style-type: none"><li>Financial Statement Closing</li><li>Reconciliations</li><li>Fund Accounting</li></ul>

# RPA Case study: Document generation & Sign off process

**Requirement:** Should allow user to dynamically design a workflow to execute in sequential or complex parallel order. A word document should be generated with data from source excel files, corresponding approvers and trigger a workflow. Stage wise signature approvals are monitored to complete the sign-off. A workflow completion email and report should be generated.



## Technical aspects

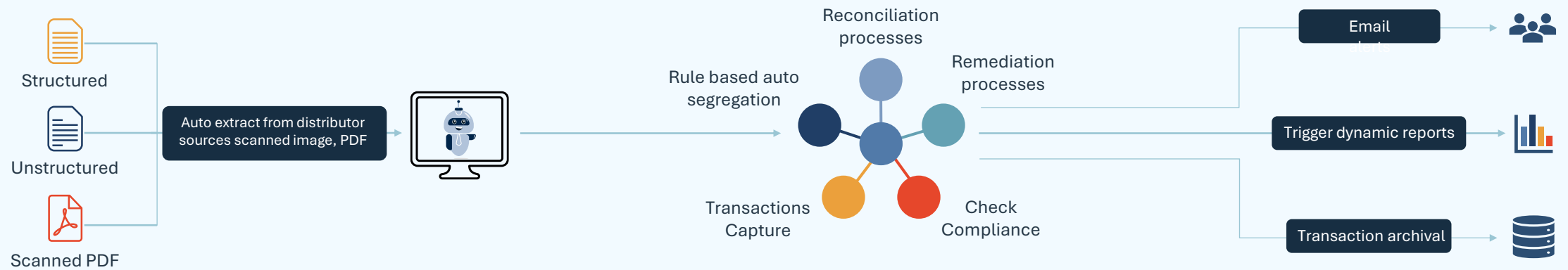
- UiPath Studio
- Robotic Enterprise (RE) Framework
- MS Word, Excel Automation
- Email Automation & data formatting using HTML

## Benefits

- A complex 2 different BOTs working in tandem to address the requirement challenge
- Complete workflow is completed within 6 minutes
- 80% of manual effort saving in a day

# RPA Case study: Everyday transaction reconciliation process

**Requirement:** Extraction of subscription, redemption & switch values received from multiple distributors in **structured, unstructured** or in **scanned pdf**. Data should be validated & reconciled corresponding to distributors. Generate a consolidated daily transaction report



## Technical aspects

- UiPath Studio
- Robotic Enterprise (RE) Framework
- OCR engine (hybrid), PDF automation
- Data extractor using REGEX

## Benefits

- BOT processes **13** different distributor files in **8** mins compared to **3** hours if done manually
- **95%** of manual effort saving in a day
- BOT is built with intelligence to identify transaction types automatically
- BOT is capable of handling **500** transaction files in a single trigger without manual intervention

# Testing Capabilities

## Certified test professionals



200,000 + man Hours of testing experience

## Testing services

- Functional
- Automation
- Performance
- Mobile



## Specialized testing

- Data migration testing
- ETL / Data reconciliation
- API testing
- RPA leverage for Testing
- Security / VAPT
- AI / Predictive systems

## Test consulting

- QA process assessment
- Test governance
- Defect management
- Automation



## Domain UAT

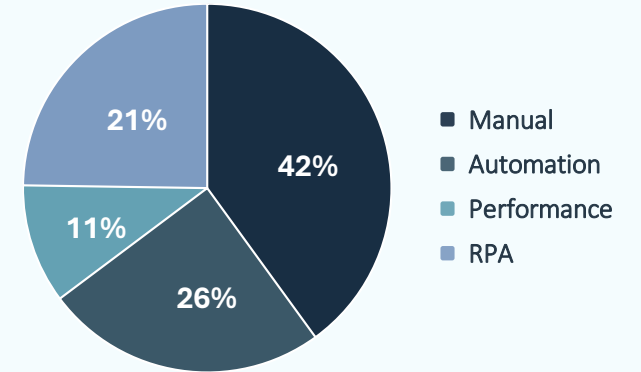
- Investment management
- Asset servicing
- Private credit funds
- Insurance
- Logistics

## Key client engagements

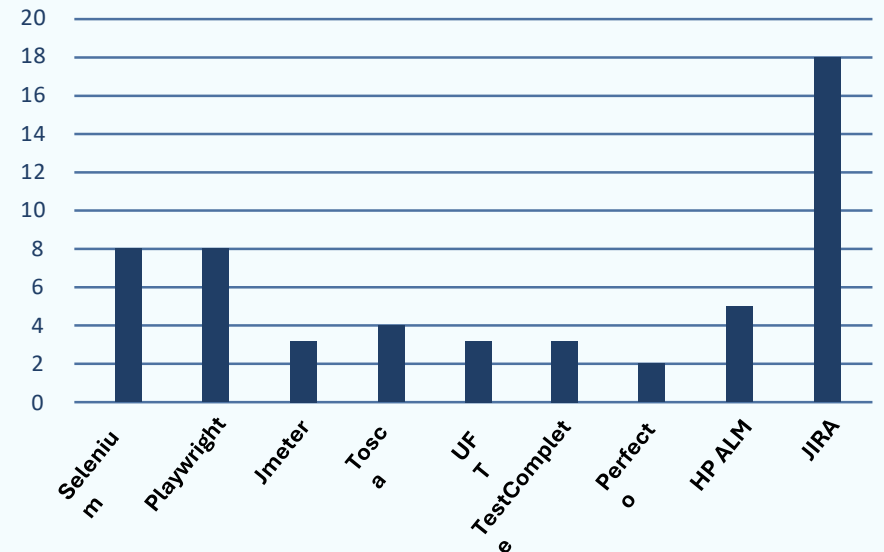
- Singapore Sovereign funds
- US Asset services
- HK Insurance - AM



## Team skill set



## Automation expertise

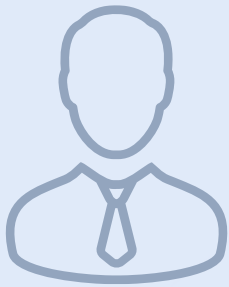


# Testing Case study

## Client

**Investment workflow  
Integration, Data & User  
Acceptance Testing**

**Client:** State-owned holdings  
company based in Singapore



## Case

**We were engaged in  
critical roles to ensure  
end to end dataflow  
testing.**

- Tested the integration of multiple interfaces connecting the workflow, accounting and reporting system
- Test various accounting data transformations performed by the newly built interfaces.

## Solution

**Our Test coverage**

- Data integrity checks
- Point-to-point (P2P) testing of interfaces to handle data transfers
- Reconcile Source vs Target transformed data
- End to End UAT process to test the stage wise data transformation
- Test Management and Defect Management using JIRA
- Selenium based test automation for DQ checks and data reconciliation

## Impact

- Streamlined historically unstructured test methods and introduced a standard test strategy covering data testing aspects.
- Tested two major interfaces that pushes data across enterprise applications & ensured data quality and correctness
- UAT of complete workflow across multiple touch points.
- Successfully reconciled historical data and daily data flow from multiple sources for product types Funds & Equities

# Case study: Ai / ML Capabilities

## Document classification

### Problem statement

Manual classification of trade documents of various kind requiring a specialist.

### Solution

Developed a machine learning-powered document classifier using NLP.

### Impact

99% classification accuracy, significantly reducing human error and increasing efficiency.

### Tools



### Techniques

- Supervised Learning
- Hyper-Parameter Tuning



# Case study: Ai / ML Capabilities

## Information extraction

### Problem statement

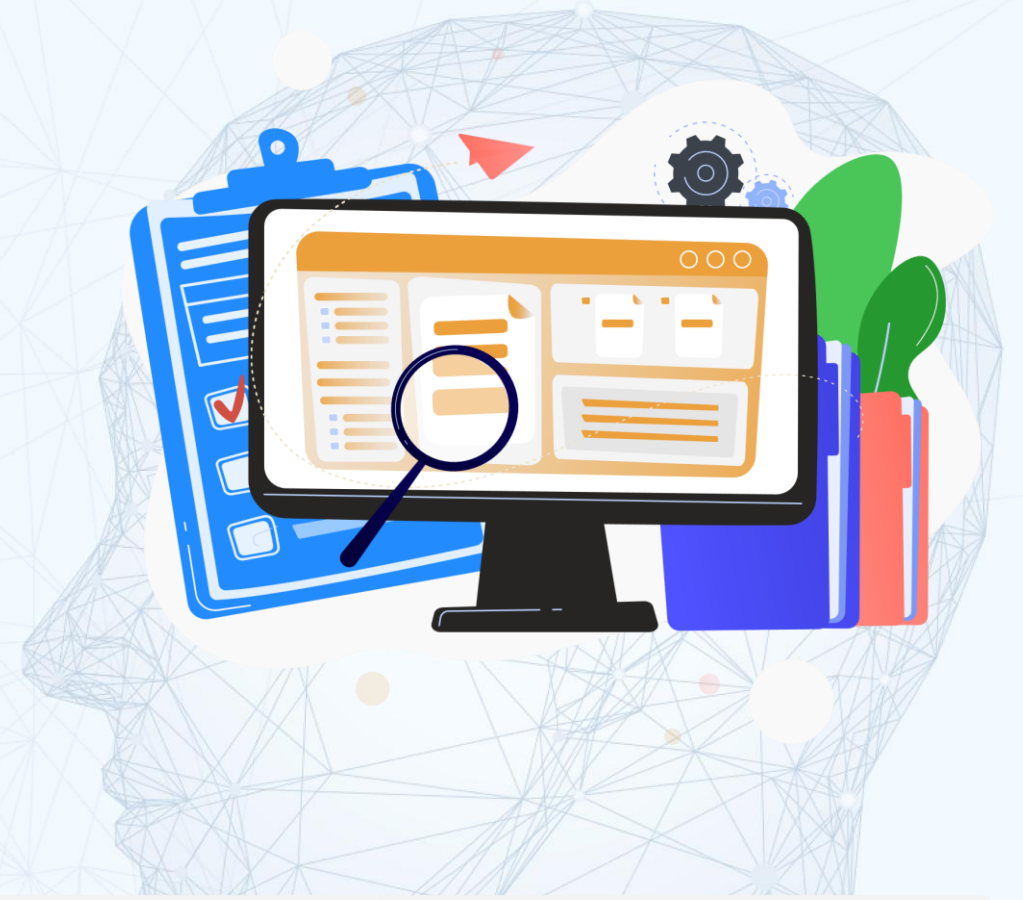
Tedious manual data extraction from complex trade documents

### Solution

Used Large Language Model (LLM) and OCR to automate data extraction.

### Impact

Achieved **91%** accuracy, improving the speed and accuracy of data retrieval



## Tools



Hugging Face



Transformer  
Reinforce  
ment Learning



## Techniques

- Reinforcement Learning
- Model Quantization
- Parameter Efficient Fine-Tuning
- Reinforcement Learning with Human feedback

## Foundational models



LLAMA 2

# Case study: Ai / ML Capabilities

## AI Data analyst

### Problem statement

Extrapolating insights from large volumes of structured and unstructured data.

### Solution

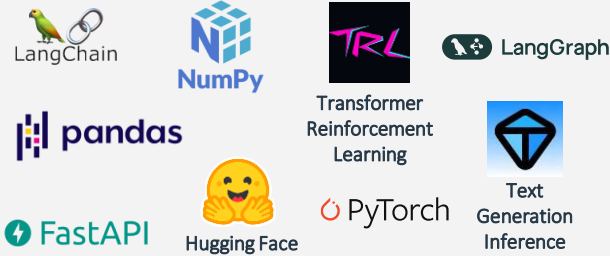
Custom-trained AI Data Analyst using LLM agents to automate data analysis through natural language queries.

### Impact

Enabled non-technical users to easily interact with data, making **faster** and more informed business decisions.



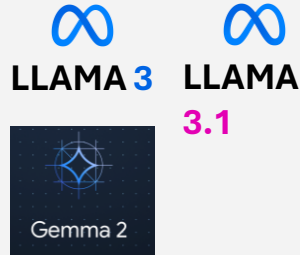
### Tools



### Techniques

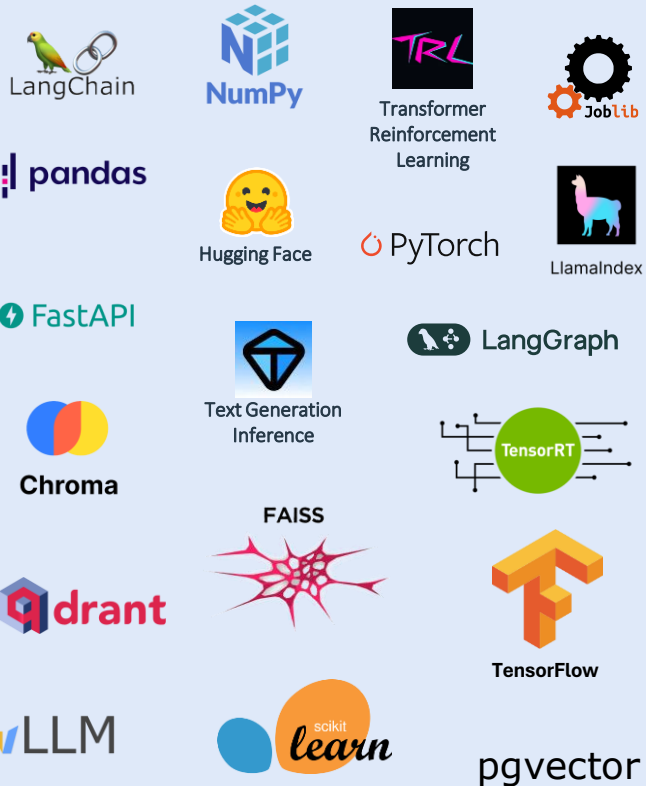
- Reinforcement Learning
- Model Quantization
- Parameter Efficient Fine-Tuning
- Reinforcement Learning with Human feedback
- Document Embeddings
- Retrieval-Augmented Generation

### Foundational models



# AI Technology expertise

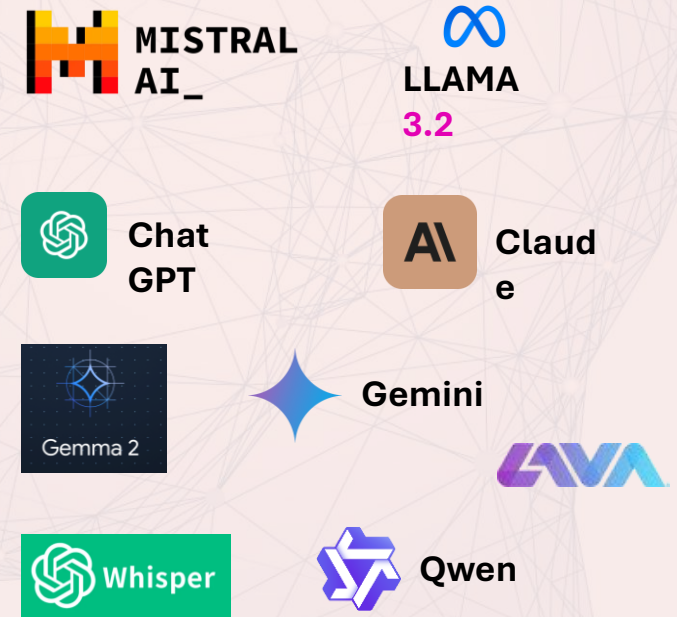
## Tools



## Techniques

- Agentic Systems
- Supervised and Unsupervised Learning
- Reinforcement Learning
- Model Quantization
- Parameter Efficient Fine-Tuning
- Supervised and Unsupervised Learning
- Prompt Engineering
- Document Embeddings
- Retrieval Augmented Generation
- Guardrails

## Foundational models



# Managed services - Engagement models

All development, testing, RPA and application support can be offered as Managed Services



## Resource augmentation

- Supplement client's teams on a need basis at on-site or off-shore
- Resource management by client



## Dedicated team

- At on-site or off-shore
- Resource management by Efforts Solutions



## Build-Operate-Transfer

- Start as dedicated model and transition to clients



## Ad-Hoc / Project based

- Ad-Hoc Engagement for a specific project

# WHY CHOOSE US?

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-  We give you Quality Flexible Support
-  Our team applies best solutions in the markets to fulfill the work perfectly.
-  We always provide you with the newest technologies and solutions available.
-  We always choose the best practices in the industry for your business
-  We continuously supervise over our projects even after we submit our work
-  We also have strong alliances with partners to deliver business solutions



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# LET'S TRANSFORM YOUR BUSINESS TO GLOBAL REACH

**Schedule a free consultation to discuss your specific needs and explore  
How we can add benefits to your organization with digital transformation.**

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