SS&C | Salentica

Work Smarter, Not Harder with Intelligent CRM

Click to continue

Intelligent CRM: Work Smarter, Not Harder

An intelligent CRM solution is about business processes, relationships and system integration. It's a combination of tools and workflows designed to help you work smarter as a way to grow your business.

Automated Workflows — save time, reduce risk, improve service quality, and be more productive

Configurable Dashboards and Views — customize and personalize data

Business Intelligence — leverage valuable insights to make informed strategic decisions

System Integration — easily integrate with other systems

Service Tracking — proactively manage client relationships

Mobile Flexibility — access client information anytime, anywhere

Quality Assurance — protect data integrity

Click to select...

AUTOMATED WORKFLOWS

CONFIGURABLE DASHBOARDS AND VIEWS

BUSINESS INTELLIGENCE

SYSTEM INTEGRATION

SERVICE TRACKING

MOBILE FLEXIBILITY

QUALITY ASSURANCE

Continue

AUTOMATED WORKFLOWS

Automated Workflows

An intelligent CRM solution enables you to set up consistent, repeatable workflows for routine client service tasks — saving time, reducing the risk of errors, improving service quality and empowering people to use their time more productively.

New account opening: Accelerate the process and ensure compliance with all disclosure requirements.

Client onboarding: Seamlessly convert prospects in the system into clients.

Client reviews: Systematize client review preparation and set up reminders for action items from meeting notes.

Portfolio monitoring: Alert advisors to portfolio drift relative to the designated model.

Relationship milestones: Receive automatic notifications and action reminders of important dates in your clients' lives.

Investing time on the front end to set up automated workflows according to your firm's needs, allows you to reap dividends in **enormous time savings**.

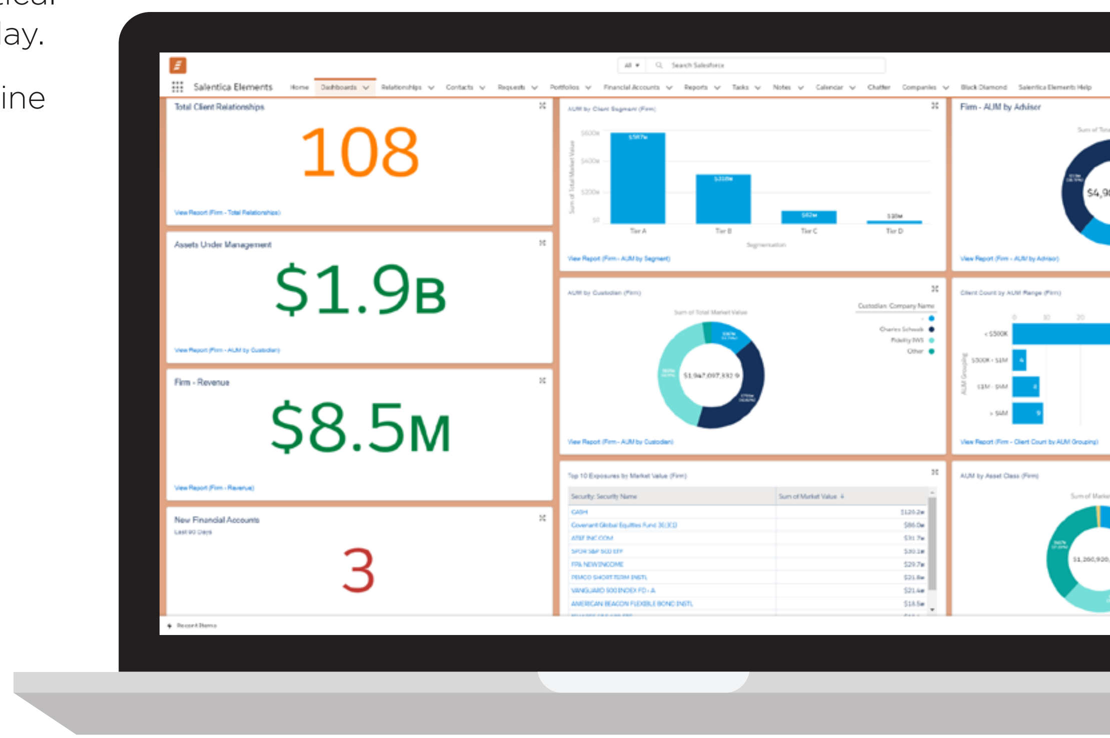
CONFIGURABLE DASHBOARDS AND VIEWS

Configurable Dashboards and Views

With intelligent CRM, users can custom-configure their own dashboards to surface the information they need for their roles, whether as a business user or an administrator.

Advisors can create personalized views and see instant snapshots of the critical client data they need to start their day.

Your firm can automate and streamline Know Your Client (KYC) processes specifically for client due diligence and compliance to stay current with regulations.



Business Intelligence

Who are your most profitable clients? How much of your revenue do they account for? Are they getting older? Who are the firm's top performing advisors?

Your CRM contains a wealth of information that provides insight into the health of your business. Intelligent CRM enables you to derive valuable insights from that information. Use it to analyze such factors as:

Measurements:

- Client profitability
- Client size by AUM
- Client segmentation
- Relationship tenure
- AUM by advisor
- Advisor new business performance
- Asset inflows and outflows
- Frequency of contact
- Referral networks and contacts
- Client satisfaction and net promoter scores (NPS)

Trends:

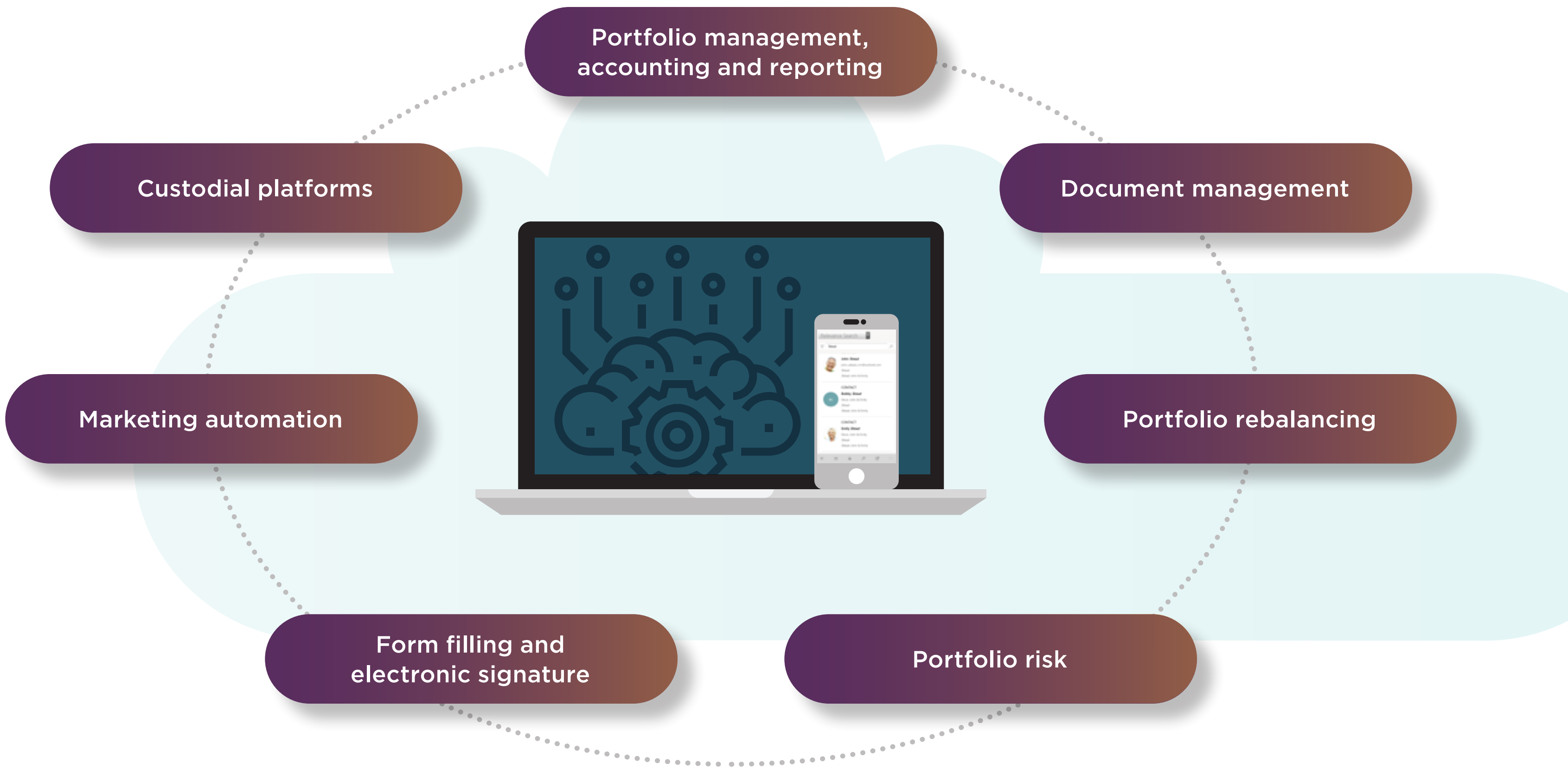
- Organic business growth
- Client demographic and age
- Prospect conversion
- Client attrition/account closing
- Changes in client value over time

With a clear picture of client and business trends, it's easier to identify the challenges and opportunities your firm faces and make informed strategic decisions.

SYSTEM
INTEGRATION

Integration with Essential Systems

The CRM system is one part of your technology platform. An intelligent CRM solution drives greater efficiency by integrating easily with the other critical systems and applications your business runs on — both internally and externally.

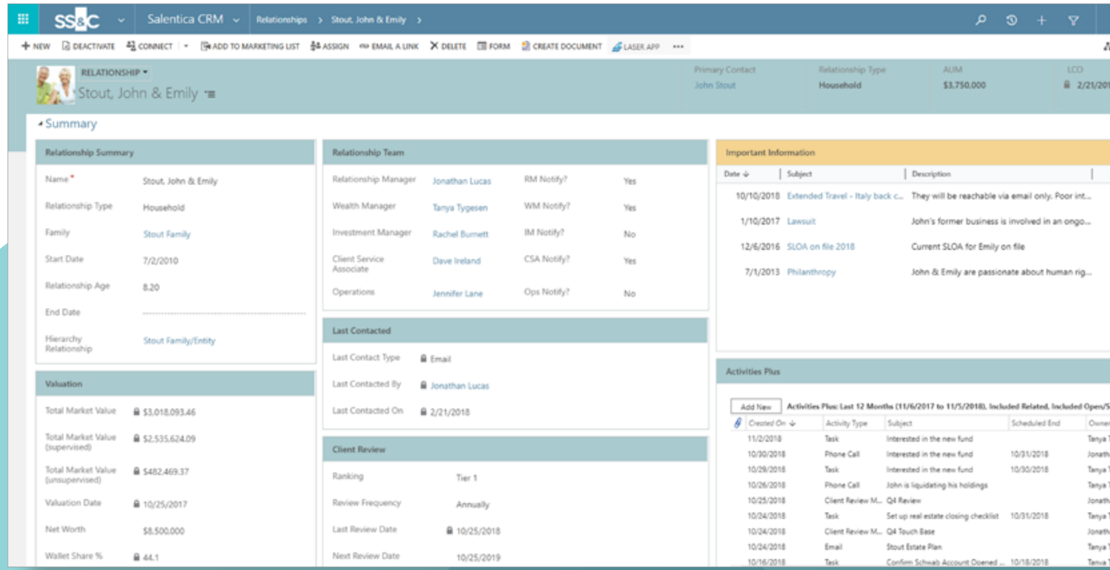


SERVICE TRACKING

Service Tracking

Intelligent CRM equips advisors to manage their relationships proactively, anticipate client needs, and deliver a superior client experience.

With intelligent CRM, advisors can rank clients by a variety of criteria, view frequency of contact at a glance, and set up notifications to know when it's time to schedule the next call or meeting.

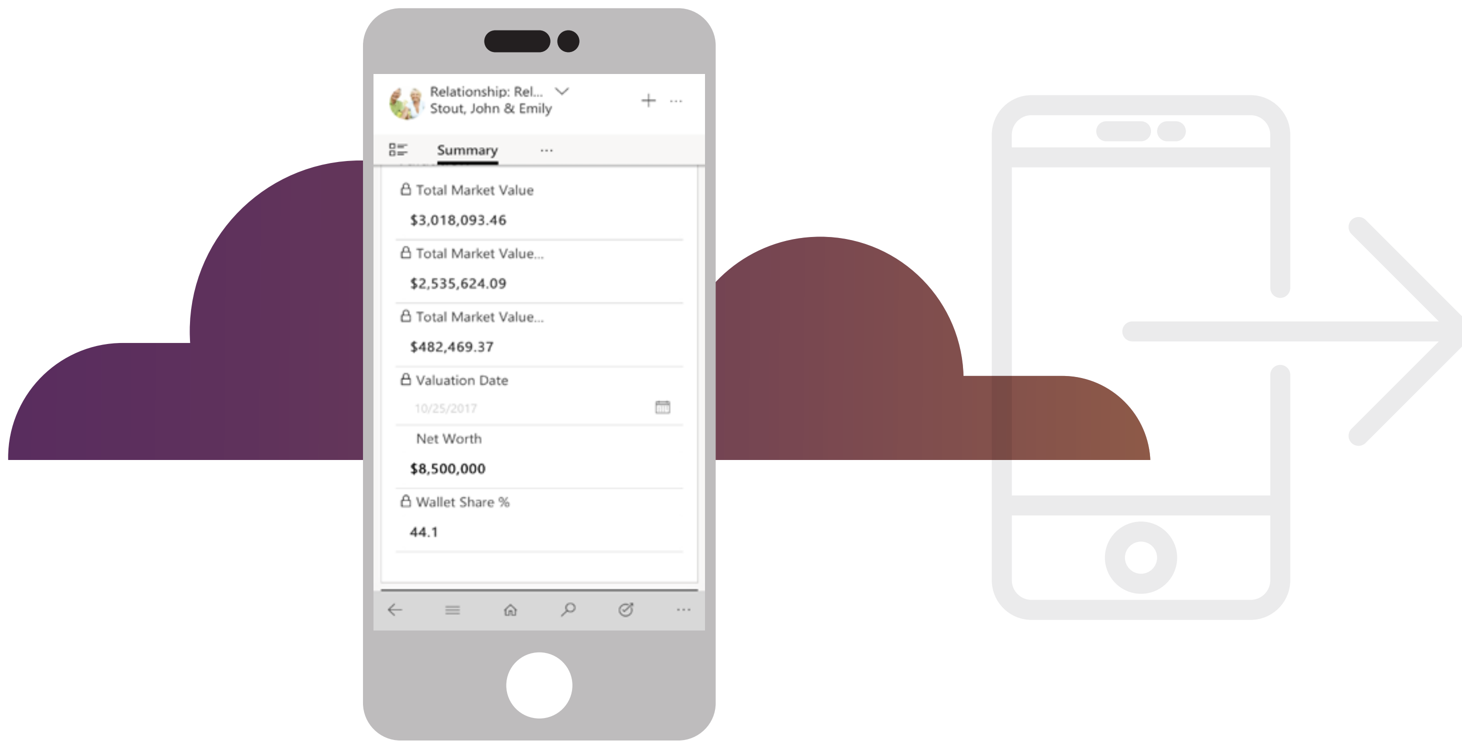


MOBILE
FLEXIBILITY

Mobile Flexibility

An intelligent CRM solution has full mobile capabilities so you can access important client information anywhere you go. Advisors can prepare for meetings on the road and adjust their agendas on the fly.

For example, if you are meeting a client or prospect in another city, with just a few taps you can quickly find any of your firm's center of influence (COI) contacts in the vicinity and arrange a call or visit.



QUALITY ASSURANCE

Quality Assurance

To ensure that the CRM solution is a trusted source of client, portfolio and business information, an intelligent CRM includes features to protect data integrity, enabling you to:

- Manage access to data
- Assign security roles and permissions
- Authorize editing and curating of data
- Track data imports and exports
- Validate new data from users entering the system

An intelligent CRM solution helps you keep track of client and prospect information, calls, correspondence, meetings, documents and decisions.

Be more competitive in client prospecting, conversion and retention.

Serve clients more efficiently and reduce servicing costs.

Deliver more relevant, meaningful and timely advice.

Collaborate more effectively from a shared base of knowledge.

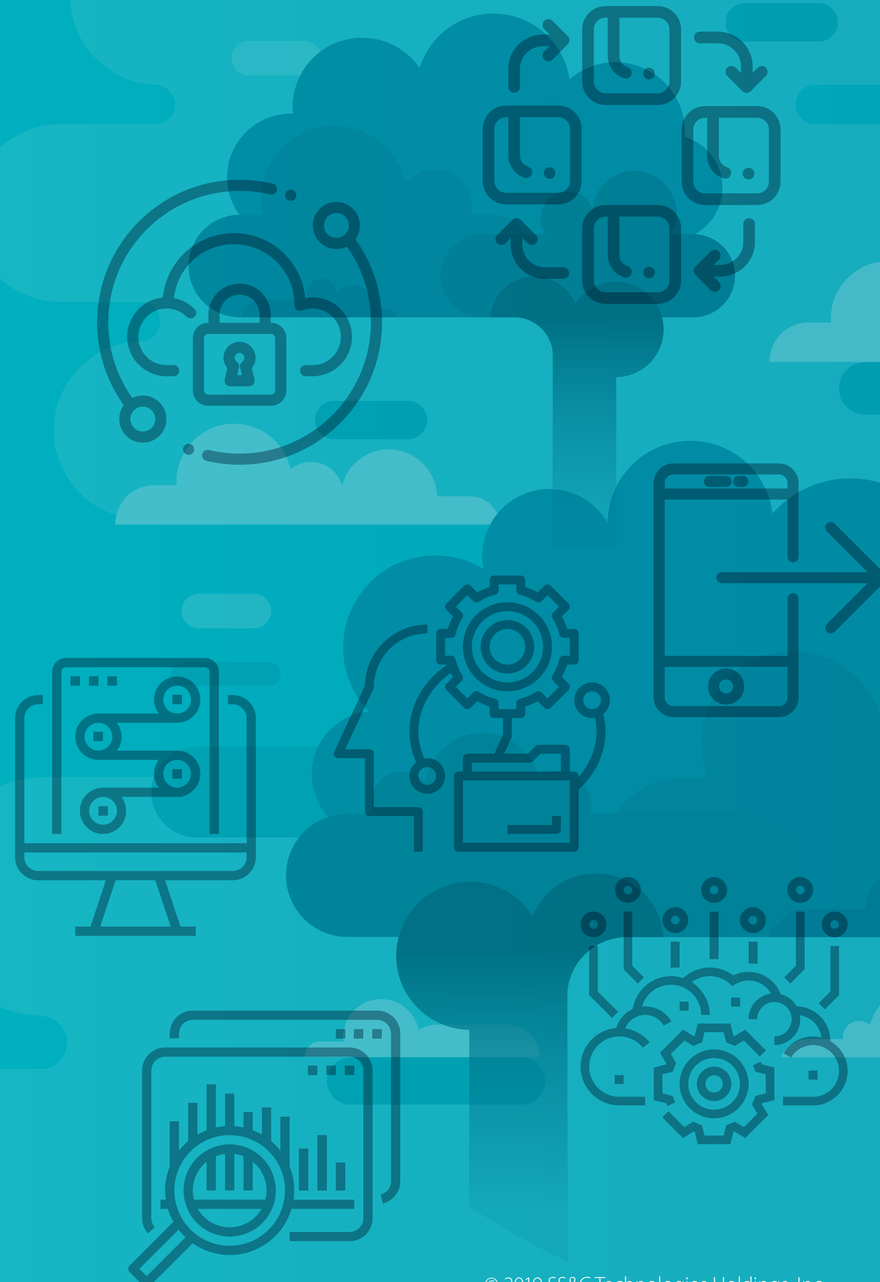
Strengthen compliance readiness.

Act upon reliable data, optimize process efficiency and drive higher productivity firm-wide.

Salentica

About SS&C Salentica

SS&C Salentica delivers intelligent CRM solutions specifically designed for the unique marketing and client relationship management needs of wealth management and RIA firms. Salentica solutions enable firms to work smarter, create a more productive and fulfilling work environment for advisors and staff, and deliver an exceptional client experience.



To learn more visit: ssctech.com/salentica