Engage | An immersive CRM

SS&C | Salentica

From Business Development to Client Engagement, Analytics to Optimization, one immersive tool to combine it all.

Engage is an incredibly flexible cloud-based CRM that gives you full control over every aspect of your business and client workflow. We provide you with the tools and support necessary for you to deliver high-value advice and bespoke client experiences.

Our "single pane of glass" model puts client relationship and financial information in one place. Allowing you to grow your business, show value to customers, and be more efficient.

Grow Your Business

Know everything about your client when they call and identify the key interactions that help build trust. Work with managers to identify whether certain staff members excel or struggle with specific tasks.

Showcase Your Value

Improved client service through improved client knowledge. Create client relationships that may span a generation, with a modern CRM to disseminate up-to-date knowledge to every stakeholder.

Efficiency at Scale

Empower your employees, operationalize and automate mundane business workflows, and eliminate roadblocks to achieve a positive ROI.

salentica.com/demo-request

We leverage financial data and technology to be more human.

Engage is optimized specifically for organizations looking to strengthen the bond between CRM and the Office 365 suite or needing advanced configurations into legacy systems.

Business process management (BPM) - Realize a faster, more automated environment by creating workflows to simplify business processes and manage them more effectively.

Holistic financial views – Organize and track all aspects your clients financial assets and liabilities in one place, including Real Estate investments, Loans, Collectibles, Mortgages, Notes, and Insurance Policies.

Value-based time and expense tracking – Easily and automatically get an understanding of the time and expenses your team is devoting to opportunities and engagements.

Leveraging a logical data model and schema to handle the intricacies of the financial industry.

- Direct email integration with real-time synchronization
- Rolling and opt-in product upgrades
- Access anywhere, anytime with rich CRM functionality across devices
- Dedicated service and support teams in North America are available for one-on-one training
- Ever-growing knowledge base and step-by-step walkthroughs are available directly in-app

Integrations

Engage natively supports integrations with the industry's most popular custodial, portfolio management, financial planning, and rebalancing products.

Easy access to TD, Schwab, and Fidelity custodial data directly in CRM with real-time custodial feeds.

charles SCHWAB

TD

Fidelity WealthCentral®

While Salentica builds, owns, and maintains an ever-growing suite of industry specific integrations, Our platform allows you to extend your sales and service capabilities with nearly any third-party app or product available in the Salesforce App Exchange.