



Deliver value and expert insight with up-to-date, complete views of clients. Provide the highest levels of service and stand out in a crowded field of competitors.

Adopt a practical, flexible, effective, and easily integrated solution to grow financial portfolios, provide superior service to clients, and quickly identify products that match client needs.

## Enterprise CRM for Wealth Management™

For wealth management organizations seeking stronger, more profitable relationships with clients, Avanade offers a solution designed specifically for financial advisers that simplifies client management while enhancing customer loyalty. Our Enterprise CRM for Wealth Management solution is based on the flexible, easy-to-use Microsoft Dynamics™ CRM platform.

### Work with a proven CRM solution for wealth management

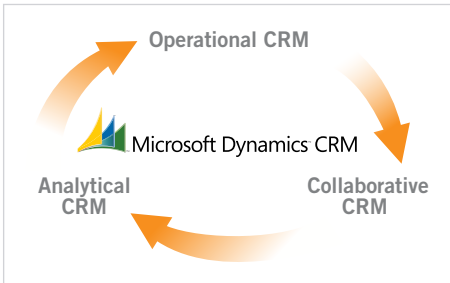
First-generation CRM products and home-grown applications have proved expensive, complicated, and often cumbersome. As a result, the key advantages of an integrated CRM solution—greater sales effectiveness and superior levels of customer service—have been beyond the reach of most wealth management organizations. To achieve this, you need:

- ▶ A 360° client view—with up-to-date, complete histories—that helps your advisers quickly identify high-value opportunities and increase client satisfaction
- ▶ An easy-to-use solution that promotes adviser success with higher-quality, effective interactions
- ▶ Assurance that your confidential client data is protected through robust security features which support regulations on controlling, monitoring, and auditing access

### CRM can be practical, flexible, integrated, and effective

Enterprise CRM for Wealth Management is a flexible, easy-to-use solution that can be readily adjusted to meet your organization's evolving needs and growth potential.

- ▶ Achieve a rapid time to market. We work with you to develop a solution that will deliver immediate benefits with minimal disruptions.
- ▶ Make better-informed decisions. Enterprise CRM for Wealth Management includes powerful analytic tools that help you spot your most profitable financial services customers, sell products, and pinpoint areas for operational savings.
- ▶ Integrate with confidence. Avanade has proven expertise implementing solutions that include integration to customer-specific transactional systems. Our unrivaled depth of Microsoft technology expertise and core competency in business processes and analytics ensure that this complex area of integration is pretested and reliable, reducing deployment time and risk.



**Get a 360-degree client view**

An end-to-end enterprise CRM solution includes operational, analytical, and collaborative capabilities that give advisers an integrated view of the client account.

**Operational**

Effective operational CRM gathers data about every aspect of the client, including risk assessment and asset/investment tracking, to create a single version of the truth. This rich information foundation is needed to identify sales opportunities and gauge profitability.

**Analytical**

Analytical CRM includes data mining to identify trends and patterns and gain insight into client sales and service needs.

**Collaborative**

Collaborative CRM delivers the right information about the right client at the right time for individuals and work teams throughout the organization and around the globe—connecting each client touch point with your company.

**Deliver insight at the point of need**

Enterprise CRM for Wealth Management tracks up-to-the-minute interactions to arm your financial advisers with a full client history, including the customer’s financial and risk background, so it takes less time to pinpoint investment opportunities.

- ▶ Gain a universal view of the client, including their relationships and portfolio value, empowering advisers to deliver a high-touch client experience, which can add up to a faster sales process and greater client satisfaction.
- ▶ Automate your organization’s unique business processes. This ensures consistency in prospect to plan and that valuable and relevant information is available to advisers who need it—when they need it.
- ▶ Personalize customer interactions and proactively anticipate customer inquiries and service needs to build customer loyalty.

**Increase job satisfaction, increase sales success**

By eliminating frustration in tracking down customer information and understanding a continually changing mix of financial products, Enterprise CRM for Wealth Management delivers a more successful—and rewarding—work experience. With improved data sharing, automated aggregation and roll-ups of account information, and streamlined business processes, your organization and your advisers can reap the benefits: repeat business, higher revenue, and greater profitability.

- ▶ Save time on administrative tasks by delivering self-service capabilities that create time for value-added client services.
- ▶ Identify opportunities to up-sell and cross-sell, driving customer loyalty and financial adviser retention.
- ▶ Ensure high rates of adoption with a familiar interface based on Microsoft® Office Outlook® that requires a reduced amount of training.

**Unparalleled expertise. Rapid deployment. Proven results.**

Avanade delivers a best-in-class platform that enables you to implement successful innovations more easily. By partnering with us, you gain from our ongoing investment in research, development, and training—the cornerstone of our unparalleled expertise. With our unwavering focus on rapid deployment, we seek to deliver the fastest time-to-value on your CRM investment. And our proven results on projects for enterprises across all industries and throughout the world assure you of less time and money spent to achieve the results you expect. With Avanade, you’ll get the implementation, training, and support to achieve strong customer loyalty and improved customer service, which accelerates growth and distances you from the competition.

**About Avanade**

Avanade is a global business solutions company dedicated to using the Microsoft platform to help enterprises achieve profitable growth. Through proven solutions that extend Microsoft technologies, Avanade helps enterprises increase revenue, reduce costs, and reinvest in innovation to gain competitive advantage. Additional information can be found at [www.avanade.com](http://www.avanade.com).

To learn more about how Avanade can assist you, visit our website at [www.avanade.com](http://www.avanade.com) or call one of our major offices:

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