PRODUCT SHEET

CLMi

CLIENT LIFECYCLE MANAGEMENT
INSPIRED

WEALTH DYNAMIX

CLMi IS A SECURE, COST-EFFECTIVE, SCALABLE AND INTUITIVE PLUG-AND-PLAY CLIENT LIFECYCLE MANAGEMENT (CLM) PLATFORM THAT PUTS THE PRODUCTIVITY OF RELATIONSHIP MANAGERS AND SATISFACTION OF YOUR CLIENTS AT THE HEART OF YOUR BUSINESS.

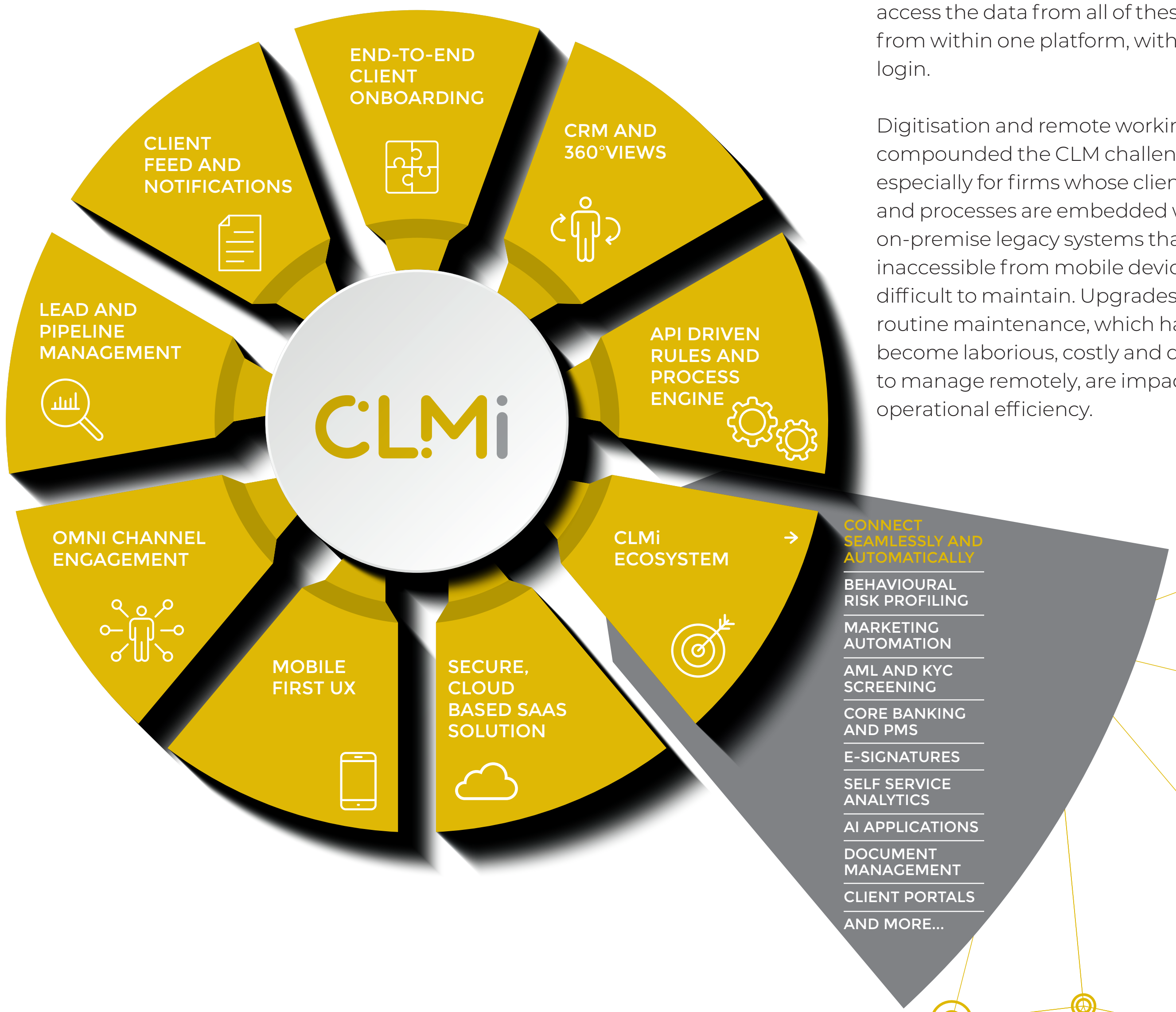
WHAT PROBLEM DOES IT SOLVE?

Until now, wealth management firms have been unable to provide relationship managers with a client lifecycle management system that helps rather than hinders day-to-day business. Most CLM or CRM tools generate more administration than they save and create a data entry burden that fails to deliver additional insights.

With multiple logins required to access all client data, and no consolidated view of the tasks that must be completed to achieve client goals, an advisor's time is easily wasted on excessive training, manual processes and switching from one system to another to formulate next best actions.

Advisors want to use the best tools possible for AML and KYC screening, digital signatures, core banking and portfolio management, and they want to access the data from all of these systems from within one platform, with a single login.

Digitisation and remote working have compounded the CLM challenge, especially for firms whose client data and processes are embedded within on-premise legacy systems that are inaccessible from mobile devices and difficult to maintain. Upgrades and routine maintenance, which have become laborious, costly and difficult to manage remotely, are impacting operational efficiency.



KEY FEATURES

AGILE TECHNOLOGY
Secure, out-of-the-box SaaS that is quick to implement, highly scalable and flexibly priced.

FULL CLIENT LIFECYCLE
A single sign-in, holistic view spanning client engagement, onboarding and management.

INTELLIGENT AUTOMATION
A rules-based business process engine with automated, best practice workflows.

SOPHISTICATED SIMPLICITY
Actionable insights automatically generated from a vast array of complex client data.

HIGHLY CONNECTED
Pre-existing integrations supercharge your CLM with best-in-class solutions, via seamless APIs.

DIGITAL AND MOBILE FIRST
Ultimate flexibility to conduct business at home, on-the-go or in person with clients.

PROACTIVE COMPLIANCE
A regulatory rules engine with automated alerts to prioritise execution.

KEY BENEFITS

STAY IN FRONT
Frequent, automated CLMi release cycles ensure your business has the best tools at all times.

SCALE AS YOU GROW
Add/remove users and functionality in line with business needs, pay only for what you need.

CUT COSTS, SAVE TIME
Reduce training and routine administration, and free time for revenue generating work.

OPTIMISE COST:INCOME RATIO
Accelerate AUM growth, empower advisors and maximise IT agility, at lower cost.

RAPID ADOPTION
Get up and running quickly with minimal training, and no complex integrations.

NEVER MISS AN ACTION
Save time, maintain focus and boost service with automated alerts of priority tasks.

ENRICH CLIENT EXPERIENCE
Shorten processes, eliminate duplication, enable digital approvals and engagement.

RE-USE CLIENT DATA
Capture client and compliance data once, and re-use across the client lifecycle.

TRACK PROGRESS IN REAL TIME
Know the status of every client's account and address issues as soon as they arise.

WEALTH DYNAMIX

At Wealth Dynamix we specialise in Client Relationship Management (CRM) and Client Lifecycle Management (CLM) specifically for the wealth and asset management, and private banking industry.

Our multi-award-winning, fully integrated, end-to-end CLM solutions address the complex requirements of client acquisition, client engagement, digital onboarding, regulatory compliance, relationship management, and ongoing client servicing.

Since 2012, we have been partnering with leading financial services organisations to help deliver exceptional client servicing quickly, efficiently and cost-effectively.

We have offices and clients in three continents, award-winning implementations, stand-out technology, unrivalled functionality and world-class support services.

Trust Wealth Dynamix to help you manage client servicing more effectively.

CONTACT US

Interested in learning more about Client Lifecycle Management?

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