WEALTH DYNAMIX

5 REASONS TO CHOOSE WEALTH DYNAMIX

INTRODUCTION

Do you have 360-degree visibility of your clients' goals and characteristics, spanning the entire client lifecycle? Are your relationship managers fully equipped to deliver proactive and personalised client service? Are your client lifecycle management systems compliant, scalable and cost-effective?

With Capgemini's 2019 World Wealth Report highlighting that 91% of high net worth individuals consider service quality to be an essential wealth manager selection criterion, the stakes have never been higher. Technology-enabled Client Lifecycle Management (CLM) is the answer, although just 25% of firms have a fully integrated system which covers the entire client lifecycle, and 37% are stalled in the earliest stages of leveraging this technology, according to a recent survey by WealthBriefing.

Wealth Dynamix provides a multi-award-winning, fully integrated, end-to-end digital CLM solution that addresses the complex requirements of client acquisition, client engagement, digital onboarding, regulatory compliance, relationship management, and ongoing client servicing.

Powered by cognitive services and powerful analytics to separate the signals from the noise, our solution generates deep, actionable insights based on the aspirations, preferences and sentiments of clients. These insights are accessible at every stage of the process – from initial engagement through to onboarding and ongoing relationship management – in a simplified form that enables relationship managers to recommend the right products, at the right time.

If your CLM is failing to deliver a holistic 360-degree client view, and is impacting client acquisition and retention, discover how you can win with Wealth Dynamix.

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REVOLUTIONISING CLIENT LIFECYCLE MANAGEMENT

For many wealth managers a holistic client view, which is the linchpin of exceptional client service, has proved elusive. Unconnected organisational frameworks and siloed technology infrastructures present challenges during the client lifecycle that have proved too complex, risky and costly to tackle. The real casualty in all of this is the client, who continues to experience patchy, inconsistent and sometimes frustrating service, throughout the lifetime of their relationship with you. None of this bodes well for client acquisition and retention, which ultimately impacts AUM growth and cost-to-income ratios.

Wealth Dynamix has revolutionised client lifecycle management and is at the forefront of innovation. Our ground-breaking application of data modelling, predictive analytics and sentiment analysis is providing wealth managers with the rich and insightful client data required to ensure that clients are being serviced quickly, efficiently and cost-effectively, with relevant and timely communications and proactive next best actions.

Client-centric

with a holistic view of client journeys you can achieve seamless handoffs, align internal touchpoint owners and formulate clearly defined engagement plans.

Insightful

by transforming data into actionable insights, which indicate a client's propensity to invest, you can engage them with more compelling and timely marketing campaigns.

Connected

data and insights captured throughout the client lifecycle are accessible to all authorised parties, across the organisation. They enable you to accelerate conversions and share feedback within and between departments.

Efficient

adopting a 'capture once, use many' approach to data management helps to eliminate disparate silos and minimise manual processes. Clients experience less friction and advisors gain more time to spend engaging directly with clients.

Compliant

capture all data required to meet regulatory obligations just once, as quickly and easily as possible, and re-use it to add value throughout the entire client lifecycle.

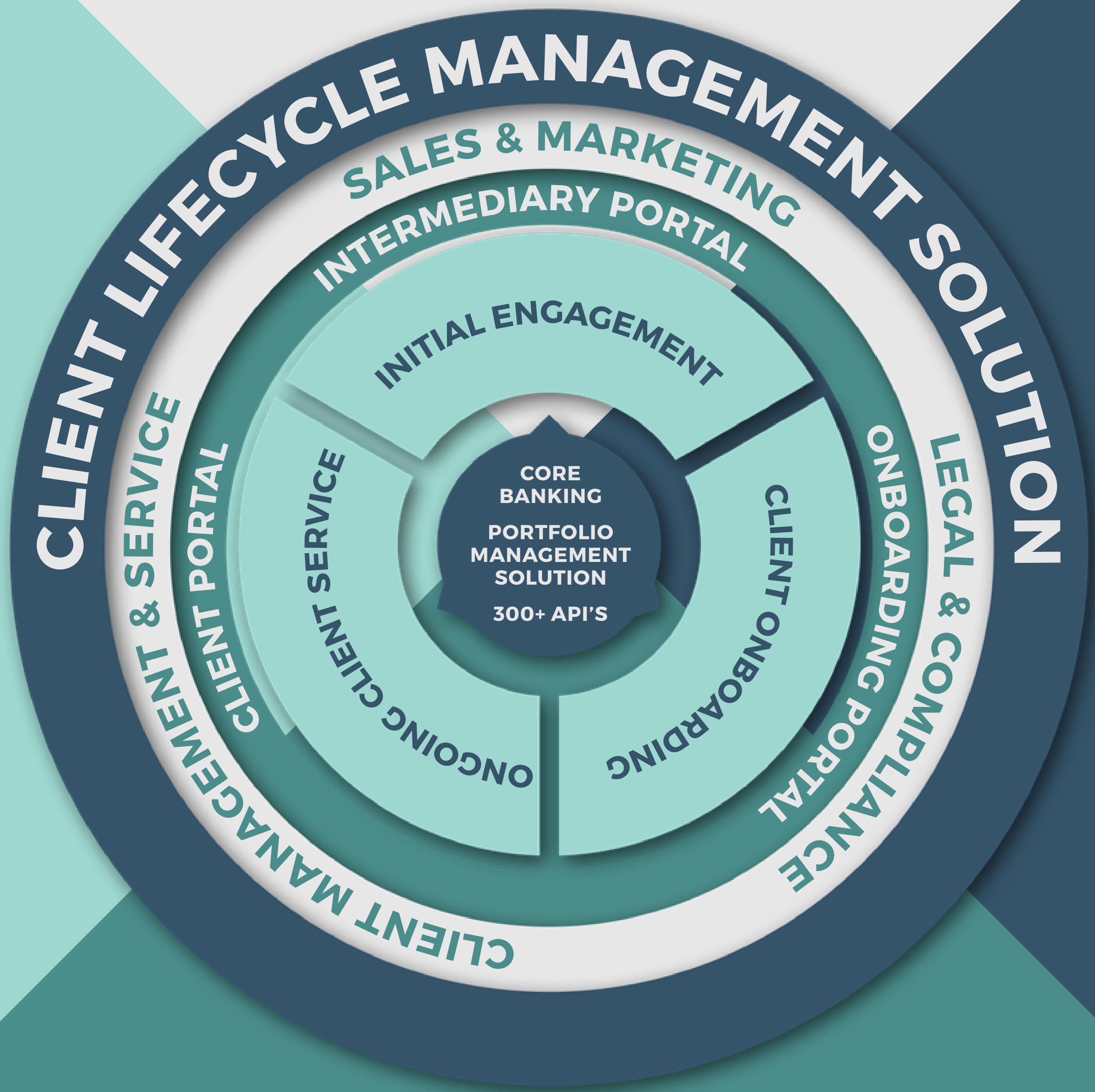
Be collaborative.
Be responsive.
Be profitable.

"Wealth Dynamix has a unique solution that enables wealth managers to better serve their clients, by streamlining time-consuming administrative processes and driving advisor productivity, compliance and business growth."

PATRICE AMANN, FINANCIAL SERVICES LEAD (EMEA), MICROSOFT

Learn how wealth managers can engage, onboard and manage clients more efficiently and effectively

Find out more



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TRANSFORMATIONAL TECHNOLOGY

How long would it take your relationship managers to assess all of the data you have on a client? Answer: hours or days, because data silos exist and many relationship managers must log in to multiple systems to gather client data into a meaningful form and chase paper trails.

With the need for speed, quality and personalisation at an all-time high, it is increasingly difficult to deliver exceptional client service with current tools. The number and frequency of touchpoints has spiralled, the variety of client journeys and channels used is diverse, and the volume and complexity of regulatory requirements has outpaced all expectations.

With the lens now firmly focused on productivity and how best to meet client expectations, agility is the game-changer. Wealth Dynamix clients are seizing the opportunity to convert client service into a responsive and forward-looking function, resulting in significant AUM growth and improved cost-to-income ratio.

Wealth Dynamix was the first wealth management technology (WealthTech) firm to transform CLM processes with innovative applications of data modelling, predictive analytics and sentiment analysis. In 2012 we selected the industry-leading Microsoft Dynamics CRM as the foundation for our WDX1 CLM platform. Our clients can rely on Microsoft to be at the cutting edge of global technological advancements, including AI cognitive services, the cloud and investing $billions in technology innovation.

Microsoft has fully-embraced cloud technology and guarantees airtight security of Azure, in line with global, cross-border regulation. Many Microsoft business apps are already cloud-only. However, Wealth Dynamix clients who prefer on-premise implementations have the choice; you are fully-supported, whichever you choose, and you can migrate at any time.

The true value of WDX1 is not in the capture and retention of historical and socio-demographic client data, stored in the CRM. What really excites is the way we apply advanced analytics and augmentation techniques to generate rich, cultivated data that provides internal stakeholders – across the organisation – with a holistic client view. Wealth Dynamix has years of experience implementing hundreds of API integrations, which aggregate all of your client data within a single CLM hub.

For pioneering automation of Client Lifecycle Management, Wealth Dynamix is the one to watch.

"The need for regulatory compliance and our desire to further enhance the efficiencies of our front office was set in the context of an aggressive timetable and specific requirements. We needed to adopt a technological approach and were able to use WDX1 built on an industry-standard platform, which Wealth Dynamix tailored for our specific needs and delivered on time and on budget."

MICHAEL BENNETT, COO, CHARLES STANLEY PLC

3 INDUSTRY EXPERTISE

Wealth Dynamix is an award-winning CLM solution crafted by wealth managers and built by WealthTech experts. Our highly-experienced staff have worked in wealth management for decades. We knew that we could deliver clear and sustainable improvements in client acquisition, client engagement, digital onboarding, regulatory compliance, relationship management and ongoing client servicing.

We understand the regional differences relevant to wealth management and we tailor our solution to address your challenges. We have scrutinised the reasons why advisor adoption of CRM is so low and we have created an easy-to-use CLM solution that encourages adoption.

Every Wealth Dynamix client is a private bank, wealth manager or asset manager, ranging from mid-sized regional firms through to industry-leading global enterprises.

Having deep knowledge of CRM and CLM is the foundation for break-through solutions, shorter implementations, more predictable outcomes and greater value for money. Industry knowledge can ONLY be gained through experience, which Wealth Dynamix has in abundance.

Headquartered in London (UK), Wealth Dynamix also has offices in New York, Geneva, Zurich and Singapore. No other company has the breadth and depth of CLM experience to meet the specific requirements of international firms and their clients.

- If a provider you speak with can't demonstrate expertise in wealth management, they don't understand your challenges.
- If they can't provide a platform encompassing all of the client touchpoints within your firm, they are not delivering a genuine end-to-end CLM solution.
- If they can't provide access to enriched client data, across multiple departments and teams, they can't deliver a holistic client view
- If they focus primarily on just one part of the process, such as onboarding and KYC, they do not support true CLM, from initial engagement right the way through to ongoing client servicing.

For a holistic client view spanning the entire client lifecycle, Wealth Dynamix will work for you.

"Wealth Dynamix has clearly demonstrated a level of expertise and a track record of delivering CRM and client onboarding technology to the wealth management industry. We look forward to working with Wealth Dynamix as Rathbones takes a leading role in adapting to technological evolution and continues to grow as a business."

ANDREW BUTCHER, COO, RATHBONES INVESTMENT MANAGEMENT

What are the main challenges for the wealth management sector today and where can technology to make an impact?

Find out more

Regulation Asia Awards for Excellence 2019

FAMILY WEALTH REPORT AWARDS NEW YORK 2019 SHORTLISTED

WealthBriefing EUROPEAN AWARDS 2019 CRM SYSTEM WINNER Wealth Dynamix

FT 1000 Europe's Fastest Growing Companies FINANCIAL TIMES

WEALTHTECH100

PRIVATE BANKER INTERNATIONAL

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PARTNERING FOR SUCCESS

At Wealth Dynamix, we partner with clients, technology providers and implementation specialists for the long term.

High quality client service is mission-critical and must be underpinned by technology that is robust and functionally-rich. Our long-established ISV 'Preferred Partner' alliance with Microsoft gives you peace of mind that your CLM platform will be reliable, accessible, well-maintained and secure – always for clients needing specialist help in assessing requirements or implementing a CLM solution, we also partner with carefully selected delivery and consultancy firms to support your business, as required.

Wealth Dynamix works with you to deliver immediate and ongoing savings, but we also partner with you to create a more collaborative and connected way of managing client relationships, now and into the future. We understand client expectations, and we empower you to deliver.

We understand that your ultimate goal is to take the heavy-lifting out of your CLM processes, and while some may begin tackling the entire CLM process from the outset, we know that others will want to address one element at a time. Our WDX1 CLM platform offers a range of modules that can be rolled out, as and when needed, over the lifetime of our partnership.

You want to address onboarding first? No problem. Want to create more effective marketing campaigns by integrating feedback from relationship managers into messaging and delivery? Of course, you can… although true CLM will only be achieved when each part of the process is automated and connected. Whatever you decide, Wealth Dynamix is your flexible CLM partner for the future.

If you're looking for a partner, not a supplier, Wealth Dynamix is the one for you.

"Wealth Dynamix adds true value for Synpulse clients at a time of increased competition and unsure markets, helping them to improve CIO ratios, enhance the client experience and drive advisor productivity."

THOMAS SCHAFFNER, HEAD OF UK, SYNPULSE

See our award wins, partnership announcements and other company news on our insights page

Find out more >

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DELIVERING RETURN ON INVESTMENT

Any investment in technology requires a thorough understanding of the business outcomes expected, along with a full appreciation of the likely cost and time savings.

With Wealth Dynamix the calculation is easy. Examples of returns reported by current clients include:

Same day client onboarding, reduced from 30+ days

50% increase in front-office productivity

300% growth in outreach campaign efficiency

80% less time spend managing service requests

40% rise in staff satisfaction resulting from improved adoption of technology

At Wealth Dynamix we work with clients to establish pre-determined business objectives that are used to measure return on investment. Because CLM spans many different business functions, from sales, marketing and client service through to compliance, we confer broadly across your organisation to identify ROI goals, by department or team.

We also work with you to minimise your deployment and ownership costs. Our CLM solution is inherently fast and easy to implement, saving vital time and cost before go-live. Once live, we offer the option of self-administration, to reduce ongoing reliance on Wealth Dynamix. This option is popular with clients, because the technology and configuration tools are very easy to use, and self-administration is a more cost-effective option.

Finally, rather than requiring you to purchase ongoing support services individually on an ad hoc basis, Wealth Dynamix offers two flexible, pre-paid managed services options: Enhanced and Premier. These highly-discounted packages include cost-effective credits for development hours, which can be used for a variety of post-implementation support services including enhancements, upgrade support and training.

For cost-effective CLM, with proven ROI, Wealth Dynamix is the worry-free option.

"The ability to reduce costs while at the same providing client service at the highest level is a major challenge for wealth managers today. Our WealthBriefing Asia judges were most impressed by the proven ability of the Wealth Dynamix client lifecycle management platform to generate vast savings and significantly enrich the client experience."

STEPHEN HARRIS, CEO, CLEARVIEW FINANCIAL MEDIA

Wealth Dynamix offers wealth managers the opportunity to purchase a Study – a small pre-POC investigation to determine the right KPI's and ROI expectations from a Client Lifecycle Management solution

Tell me more >

WEALTH DYNAMIX

WHY WEALTH DYNAMIX?

At Wealth Dynamix we specialise in wealth management Client Relationship Management (CRM) and Client Lifecycle Management (CLM).

Since 2012, we have been partnering with large to mid-sized 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.

ABOUT US

Founded 2012

Privately owned

Headquartered in London, UK

Offices in New York, Zurich, Geneva and Singapore

125+ staff with decades of experience in wealth management

SOME OF OUR LATEST AWARD WINS

2018 - 71st Fastest Growing Companies across Europe and 5th fastest in Fintech industry, Financial Times

2019 - Best CRM System, WealthBriefing European Awards

2019 - Best Technology Provider- Front Office', WealthAdvisor

2019 - Best CRM System and Best Change Management Process/Implementation of a Technology Solution, WealthBriefing Asia Awards

2019 - Outstanding Front Office Digital Solutions Provider, Private Banker International

2019 - Best CRM solution, Goodacre

OUR CLIENTS

Schroders

Rothschild & Co

RUFFER

Rathbones Look forward

QUILTER CHEVIOT INVESTMENT MANAGEMENT

CHARLES STANLEY

CONTACT US

Interested in learning more about Client Lifecycle Management?

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