

Microsoft Dynamics CRM for Wealth Management

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SOFTWARE SOLUTIONS

Microsoft Dynamics



Boost customer retention, proactively manage risk, slash operational costs, and more effectively monetize customer data with Microsoft Dynamics CRM.

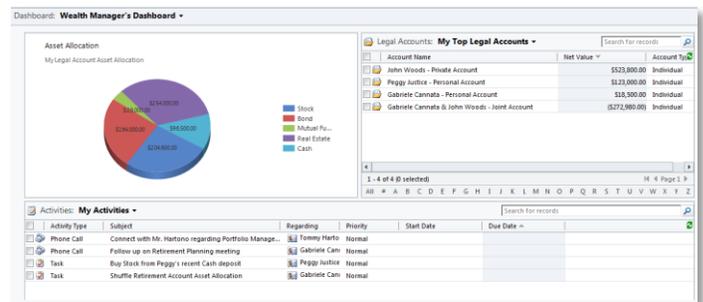
Winning the trust and loyalty of your customers has never been more important in the wealth management industry. By equipping advisors and staff with a single 360-degree view of customer information combined with real-time analytics, and process automation, Microsoft Dynamics CRM helps advisors deliver personalized services and tailored advice to customers with the simplicity and transparency they've come to expect.

Deepen Customer Knowledge with 360-Degree Views

Consolidate masses of customer data across account, portfolio, trading, risk management, and financial systems into a single client profile so that agents can serve customers based on accurate, up-to-date information.

Enable Your People to Spend More Time with Clients

Provide your agents with CRM that works seamlessly in Microsoft Outlook, giving them unprecedented ease-of-use and streamlining everyday tasks so that they can spend less time on busy work and more time with customers.



Accelerate the success of advisors by giving them unprecedented visibility into customer data, investment performance, and risk exposure through easy-to-use tools.

Acquire New Business

Reduce the administrative burden and increase accuracy by automating regular reporting processes so you can improve visibility into the business and more easily meet regulatory requirements.

Better Manage Risk

Analyze segmented customer data and seamlessly integrate with key systems to provide real-time visibility into risk so you can better manage your exposure. Use robust workflow capabilities to proactively identify issues, automate key processes, and meet regulatory requirements.

"Integration with Microsoft Office Outlook was critical. All of our branch users open Outlook every day, and that's the tool they are comfortable with."

Shawn Tabor, Technology Product Manager, Raymond James Financial

Proactively Identify Your Most Profitable Clients

Use contextual business intelligence and consolidated customer information to identify who your most profitable clients are so you can provide them with the very highest level of service.

Extend Existing IT Investments

Take advantage of the inherent flexibility of Microsoft Dynamics CRM to integrate with mission-critical business applications and existing Microsoft products so you can maximize the value of current IT investments.

Take Advantage of the Cloud

Benefit from Microsoft's multi-billion dollar investment in the Cloud, leading security infrastructure, and a 99.9% uptime SLA with Microsoft Dynamics CRM Online.

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Native Microsoft Outlook User Experience

Enable your people to work using an application they're already familiar with: Microsoft Outlook. With a native Microsoft Outlook user experience, Microsoft Dynamics CRM helps make CRM easier to adopt and cuts down on training time and cost by using tools people already know.

One Place to Manage Leads, Contacts, Accounts

Give your people one place to view and manage contacts, accounts, leads, products, opportunities, cases, and more so that they can work more productively and spend more time with clients rather than hunting for information.

Consolidated Customer Knowledge

Create a one-stop-shop of customer and product information, FAQs, knowledge base articles, and best practices for improved customer service and reduced operational costs. Empower team selling by giving your people collaborative tools and a single view of customer information.

Boost Sales Performance

Enable your advisors and staff to capitalize on new opportunities in real time with 360-degree customer views and contextual analytics. Shorten sales cycles and improve sale forecast accuracy with repeatable sales processes and intelligent workflows. Reduce busy work, automate paper based processes, simplify customer onboarding, streamline approvals, and speed issue resolution with robust workflows.

Marketing Automation

Identify high-value targets and develop targeted marketing campaigns and outreach efforts to attract new clients and improve household product ratio. More effectively segment customers using rich data and demographics, build lists of prospects, create and manage campaigns, and measure the return on investment of marketing efforts.

Streamlined Service Delivery

Give your people convenient, role-based access to complete customer data, tools to automate cross-departmental collaboration, escalations, and follow-up, and guided selling scripts so they can deliver streamlined services that delight customers.

Mobile Access

Enable mobile employees to work productively using a variety of mobile devices to access client and product information, contact customers, receive alerts, and more. Help ensure advisors are better prepared with access to customer data, preferences, and account holdings no matter where they are.

Actionable Analytics

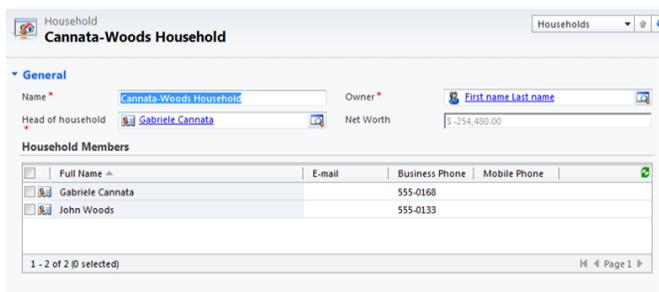
Provide your advisors and staff with personalized dashboards, contextual analytics, and flexible goal management capabilities to help them track performance, stay on schedule, and work more productively.

Compliance Management

Automate regulator-required processes and provide a detailed audit trail to help ensure full compliance with regulatory standards while protecting privacy and confidentiality. Centralize and streamline execution of critical business processes with automated workflows to help ensure all steps are completed on time and within approved, compliant procedures.

Easy Customization

Take advantage drag-and-drop customization tools and a flexible object model to tailor Microsoft Dynamics CRM to the specific needs of your organization so you can bring new services to market quickly and cost-effectively.



Increase transparency and provide personalized and accurate service so you can build long-term trust relationships with your customers.

Jumpstart Productivity with Microsoft Products

Leverage the powerful capabilities of productivity-focused solutions like Microsoft Office, Microsoft Lync, and Microsoft SharePoint Server right within Microsoft Dynamics CRM to enhance real-time communication, enable enterprise-wide collaboration, streamline content development, and improve the document management process.

A Vendor You Can Trust

Benefit from working with Microsoft, a vendor with over 30,000 engineers, that invests over \$9 billion in R&D annually, has partners in 82 countries, and provides Microsoft Dynamics CRM through multiple delivery options all based on the same architecture: on-premises, cloud and partner hosted.

"In the past, we used numerous systems to capture customer information. With Microsoft Dynamics [CRM], not only has this problem been solved, but we now have a great platform that consolidates all customer data and contacts points."

Tim Jackson, Director of Operations, Carlson Capital Management

Contact a Microsoft partner to find out how Microsoft Dynamics CRM can help your business. Or to find out more about Microsoft Dynamics CRM, visit: <http://www.microsoft.com/dynamics/crm>
United States and Canada toll-free: (1) (888) 477-7989 Worldwide: (1) (701) 281-6500

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