

CASE STUDY

SALENTICA CRM
ADVISOR EDITION

Putting great client service first

Steinberg Global Asset Management counts on Salentica for tight, seamless CRM integration with its portfolio management system

Situation

When an existing contact management system was no longer supported, Steinberg Global Asset Management began the search for something newer and better. It had to integrate with the company's portfolio management system and provide an easy-to-use, transparent and feature-rich view of all client activity on the most current platform, and it had to be deployed quickly. Salentica ran with the challenge, and the result is company-wide usage of a CRM that is saving time and money, and delivering better accuracy and business oversight.

Benefits

A true 360 degree view of the client that complements the 360 approach that our managers take with our clients.

Decision Drivers

- ◆ Integrated with Advent Axys®
- ◆ Deep industry experience
- ◆ Streamlined processes and workflows

At Steinberg Global Asset Management Ltd., business gets personal. That's because this Registered Investment Adviser, founded in 1993, prides itself on the very personal interest its principals and employees take in their clients' financial health. Approximately 300 high-net-worth families representing some \$600M in assets entrust their assets to Steinberg Global Asset Management. According to the company, such loyalty is earned by being available, being flexible, being dedicated and being the best. Demands on the firm's choice of technology are no different. Systems must be highly available, flexible to business needs, dedicated to performance, and marked by excellence. For years, Steinberg Global Asset Management has been relying on a suite of Advent® products, including Axys® for portfolio management. However, the sunseting of Advent Qube, its contact management system, prompted the firm to search for an alternative. The chosen solution was a Customer Relationship Management (CRM) solution from Salentica, purpose-built for the wealth management industry, offering the latest version of the Microsoft Dynamics® CRM platform, and meeting the most mission-critical criterion of all: tight, seamless integration with Advent Axys®.

To support consistently excellent service and enable future growth, Steinberg Global Asset Management wanted better tracking of client affairs, better reporting tools for management and an effective way to manage pipeline leads and opportunities. As well, the system had to be easy to use, and have a company look and feel. Most of all, the integration with Advent Axys® portfolio management system had to be bullet-proof.

“ *We wanted a system that could capture, in a detailed way, all our client-facing activities and operate as a hub for our business. It had to offer a reliable bridge to our portfolio management system – and because of Qube's end-of-life, we needed to act fast.*

Sean Erickson, Operations Manager

After reviewing several options including Intuit and Salesforce, the company chose Salentica's CRM for Microsoft Dynamics for the vendors' depth of experience and their integration with Advent Axys®.

SOLUTION

**SALENTICA® CRM
for Microsoft Dynamics CRM
2013 with Schwab OpenView
Gateway™**

SALENTICA®
CRM for WEALTH MANAGEMENT

For more information contact us:
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Highlights

- ◆ Comprehensive view of all client activities
- ◆ Commitment to compliance
- ◆ Seamless, automated 2-way integration with Advent Axys®
- ◆ Ability to track Share of Wallet easily
- ◆ Built-in Marketing tools for communications and new business development
- ◆ From Data Conversion through to Training and Implementation, Salentica's project managers were excellent
- ◆ Improved client data quality
- ◆ Activity history automatically captured in the CRM
- ◆ Salentica's support team have been fast to react our concerns.
- ◆ Salentica CRM solution saves time and money
- ◆ Fast, turn-key deployment of the Schwab OpenView Gateway solution

*We are very happy with the final product. Compared with what we had before, Salentica's solution is much more dynamic & powerful. **We also have been lucky with the top down adoption of the new CRM at the firm.** The CEO's favorite feature is the ability to have all emails easily tracked and client activity documented and recorded, so anyone can see at a glance what's happening with a client relationship.*

Sean Erickson, Operations Manager

The comprehensive view of all client activities is especially valuable for Steinberg Global Asset Management. This feature benefits the firm's commitment to compliance and helps keep portfolio managers accountable for all client interactions. Another well used feature is the mail merge, which can personalize outbound communications and drive new business.

Salentica has been a game changer for my workflow as PM and CEO. Our time savings allow us to monitor communications better and increase our touches with clients.

Rich Steinberg, President & CEO

Without a doubt, the integration with Advent Axys® and Schwab OpenView Gateway™ has been essential for the company. Anything tracked in Axys – withdrawals and deposits, for example, is captured in the CRM.

*The ability to push data back and forth between our CRM and Advent Axys® is what sets Salentica apart from all the other firms. This allows our principals to track new business, cash flows and look at the daily positions directly in Salentica and it can all be rolled up to a household level, giving us vital information about our valued clients and how we can serve them better. We also can push all our clients data into our portfolio system to build our client accounts and groups. **This eliminates the risks** of making mistakes and eliminates manual double work.*

*Overall the conversion to Salentica has been more successful than we had envisioned. The two project managers we worked with during the conversion, and the Relationship Manager we work with now, always went and continue to go out of their way to get what we need. In addition, Salentica's support team has been very fast to react to any of our concerns. **Several months in now, I can say it's been a very positive experience.***

Sean Erickson, Operations Manager

As important as the technology is, the real value comes from a partner who can understand the intricacies of the business and translate that into good design. Since 1997, Salentica has been working with wealth management firms, acquiring and sharing deep domain knowledge on industry best practices.