

PRODUCT BRIEF

Black Diamond CRM Support

Expert Training, Resources, and Services for Every Stage of Your CRM Journey

SS&C Black Diamond® Wealth Solutions offers education and support to help your team maximize your CRM investment, whether you are implementing a new CRM, onboarding team members, or expanding your firm's capabilities.

No matter which solution you choose for your business, you will receive ongoing training, educational resources, and expert support to drive user adoption and long-term success.

Comprehensive Training & Support

Instructor-Led Training. Live training tailored to your firm's implementation and onboarding needs helps users build confidence from day one.

Guided Learning Paths. Role-based learning journeys, from new users to system administrators, provide structured, self-paced education.

Ask the Expert. Connect directly with Product Consultants for guidance, best practices, and answers to your questions.

Knowledge Base. Access an on-demand library of product documentation, how-to articles, and continually updated educational resources.

Exclusive Client Events. Learn from product experts and industry peers through webinars, user groups, educational sessions, and strategic events.

Professional Services

If you need additional expertise or implementation assistance, our Professional Services team can assist with configuration, optimization, workflow enhancements, and other specialized projects.

Available as a fee-based service, Professional Services provides expert resources to extend your team's bandwidth and accelerate key initiatives.



For More Information

To learn how SS&C Black Diamond® Wealth Solutions can transform the way your firm manages client relationships, visit ssblackdiamond.com, call 1-800-727-0605, or email info@ssblackdiamond.com.