CRM SOLUTIONS

Black Diamond Engage

Unify Your Advisory Workflow with a CRM Designed for the Way You Work

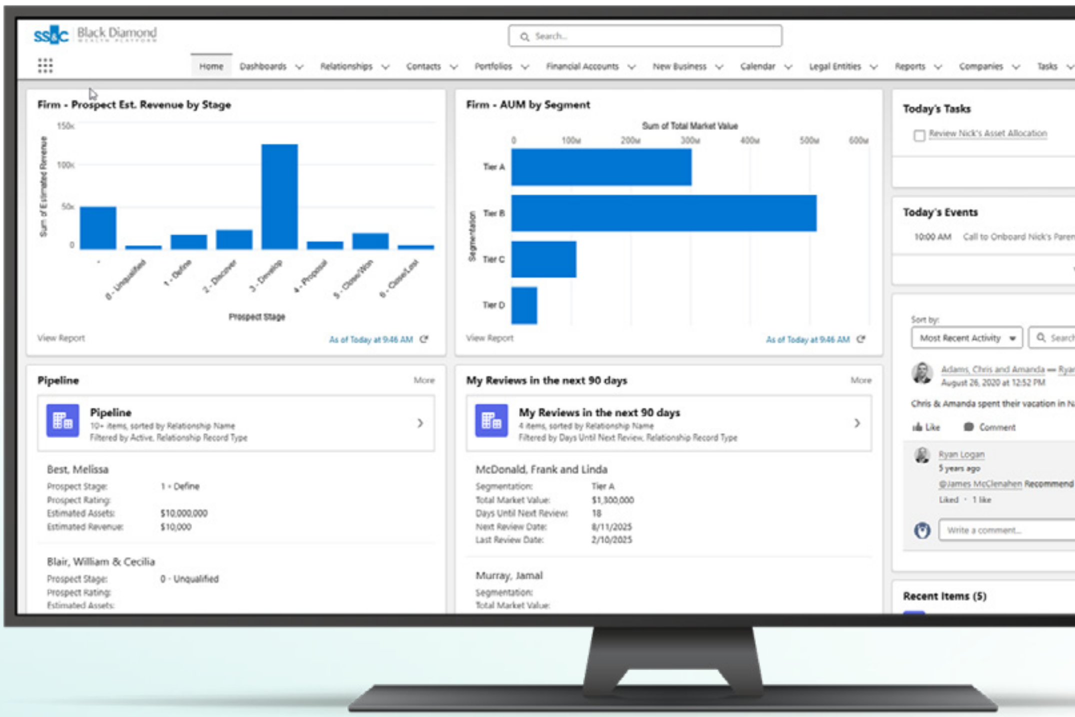
Black Diamond Engage, a flexible and highly configurable client relationship management solution, is built on the Microsoft Dynamics 365 platform. Specifically designed for wealth and asset managers, this CRM offering from SS&C Black Diamond® Wealth Solutions strengthens client engagement, streamlines internal workflows, and accelerates enterprise growth.

Tailored for Your Workflows

Account opening, client onboarding, address changes, deposits, and more are all standard workflows pre-built within Engage to simplify day-to-day advisory operations. However, we understand that every firm is unique, which is why Engage includes Workflow Manager. This built-in feature empowers your team to build and automate CRM workflows as needed. Whether managing multi-generational households, layered business entities, or intricate relationship networks, Engage stores and organizes client data to mirror how your teams work.

Key capabilities include:

- Flexible relationship mapping
- Household and entity management
- Configurable role-based views



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Role-Based Experiences Across the Firm

From advisors to operations and executive leadership, Engage supports your team with user experiences tailored to each role's priorities:

Advisors: Prioritize key relationships, plan proactive outreach, and collaborate across the firm, all from within your CRM.

Operations: Automate workflows, customize layouts, and reduce manual tasks with no-code configuration tools.

Executives: Monitor real-time performance, streamline planning, and drive strategic growth with unified data.

Embedded in the Microsoft Ecosystem

Engage is natively integrated with Microsoft 365, allowing teams to work within familiar tools like Outlook and Teams.

Innovative Tools to Power Productivity

Engage includes modules that enhance daily operations and ensure firm-wide consistency:

Client segmentation and interaction insights: Ensures client service levels are easily met

Client interaction tracking: Helping you know what's next in a client interaction

Operational workflow and activity management: Centralize key activities and increase accountability

Monitor and control client service efforts: Track the value of your time with purpose

Due diligence: Standardize key review processes

Seamless Integration with Financial Platforms

Engage offers out-of-the-box connections to key systems—including portfolio management, financial planning, document management, and custodians. These native integrations eliminate the need for costly development work and ensure data consistency across platforms.

Plus, our CRM Data Solutions offering is included with your Engage subscription, providing even greater value and seamless data access across your tech stack.

Expert Guidance

Your team is supported by a responsive group of experts who understand your business. We provide:

- Guided implementation
- On-demand training via Black Diamond University
- Access to the Help Center via the CRM and a growing knowledge base

For More Information

Contact us today to explore how SS&C Black Diamond Engage can transform the way your firm manages client relationships, scales operations, and drives enterprise growth. Call 1-800-727-0605 or email info@sscblackdiamond.com. You can also visit sscblackdiamond.com.