

SS&C Black Diamond: How Client Feedback Shapes The Platform



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SSS&C's Black Diamond® Wealth Platform is the technology hub for over 2,000 firms that collectively manage more than \$2.5 trillion in AUM. This success is not just a result of its innovative technology, but also the firm's deep understanding of its clients' needs and commitment to continuous improvement.

What was the winning formula for your firm? Why do you think you won?

What sets Black Diamond apart is our active engagement with our clients. We don't just listen, we learn. We continuously dialog with them to understand their business and what they need from their core wealth management platform. Their feedback is invaluable to our team and directly shapes the platform. They consistently push us in the right direction. Our job is not to reinvent their business but to create a platform that helps them serve their clients as efficiently and effectively as possible.

How does your team culture make a difference?

Whether in sales, service, or product development, every team at Black Diamond has an unwavering focus on our clients and creating value for their businesses. Leaders across the organization work in clear alignment to deliver the premier portfolio management solution in the market. Nobody lets ego get in the way of the right decisions. Our product development group maintains an open line of communication with the service and sales teams to identify opportunities while collaborating to provide the best service in the industry.

What are you going to do to remain competitive and stay ahead?

It goes back to understanding what matters to advisors – building

long-lasting client relationships. We continuously evaluate and explore new technologies that will create efficiencies for family offices and strengthen communication with their clients. We will continue to build upon the platform and expand the variety of services and functionality available to help our clients better serve their investors.

How do you hope your firm will benefit from getting this award?

This award, which recognizes our commitment to client-centric solutions, reinforces everything we are doing. It instills confidence in our team that we focus on the right solutions and solve real problems for family offices and their clients. I hope our users take some pride in this award, too, because it validates their choice of Black Diamond. And finally, for all those family office firms that know they need more advanced technology to support their growth ambitions, it will inspire them to check us out.

Where do you see wealth management industry and your part in it going in the next five years?

Investors are looking to advisors for advice on anything and everything pertaining to their financial lives. Technology will be increasingly important in helping advisors respond to that need. It allows advisors to create a curated experience for their clients and communicate through various channels to meet clients where they are. Our goal is for the Black Diamond Wealth Platform to be the critical piece of that technology puzzle, helping advisors to provide a richer client experience while allowing the firm to scale and serve more clients than they would without leveraging the right technology partner. We see ourselves as not just a wealth management platform, but as a strategic partner for advisors in the digital age.