

## CASE STUDY

# Bradley, Foster & Sargent

## Bradley, Foster & Sargent Drives Growth and Efficiency with Black Diamond Engage

Since its inception in 1994, Bradley, Foster & Sargent (BFS) has grown to a \$9 billion employee-owned wealth management firm serving institutions, high-net-worth individuals and families nationwide. Over the past decade, the firm has tripled its assets under management, expanded from a single office to nine, and increased headcount from 35 to 60 employees while maintaining its independent, employee-owned structure and strong client relationships.

As the firm grew in both size and complexity, leadership recognized the need to evolve its technology infrastructure. Reliance on manual PDF forms, email attachments, and interdepartmental handoffs created unsustainable inefficiencies. "We were growing quickly, but our operational processes hadn't caught up," said Olivia Devlin, Client Relationship Specialist. "We needed a CRM that could scale with us."

Having used several SS&C products, BFS sought a more powerful CRM to centralize data, automate workflows, and connect departments. After evaluating alternatives, the firm selected SS&C Black Diamond Engage, a Microsoft Dynamics-based CRM designed for wealth management.

"Black Diamond Engage provided the flexibility we needed on a trusted platform, with extensive customization options and seamless integration with the tools we use daily," said Shannon Membrino, Data and Solutions Analyst.

The firm's migration from its previous CRM to Engage marked a major step in modernizing its operations. The Engage implementation team worked closely with BFS to translate existing processes into automated workflows, ensuring that the system accurately reflected the firm's unique structure.

"Being a Microsoft shop made this a natural fit," said Membrino. "The embedded tools,

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### Profile

**Client:** Bradley, Foster & Sargent

**Location:** 9 offices in 6 states

**Description:** An RIA founded to support institutions, high-net-worth individuals and families nationwide in meeting their long-term financial goals through tailored investment management and excellent service.

**AUM:** \$9 billion

**Implementation Year:** 2024

### Background

- As the firm grew in both size and complexity, leadership recognized the need to evolve its technology infrastructure.
- Reliance on manual PDF forms, email attachments, and interdepartmental handoffs created unsustainable inefficiencies.
- The firm had a large investment in Microsoft technology and needed a solution that could fit well into their tech stack.

including Copilot and Power BI, give us advanced functionality right out of the gate. And the support team has been phenomenal, whether it's answering questions, customizing workflows, or helping us make the system our own."

Previously, many internal processes relied on PDF forms circulated via email, which were often saved in different locations and susceptible to errors. Now, 21 automated workflows handle tasks across departments, including investment changes, asset allocation adjustments, billing, and address updates.

"Everything used to be manual," said Devlin. "Now, each workflow runs seamlessly through Engage, connecting the right people in the right order and eliminating back-and-forth."

Some workflows were custom-built by the Black Diamond support team, while others were developed in-house. "For example, our billing workflow was something the support team helped us create," said Membrino. "They knew exactly how to design it for maximum efficiency, and that freed us to focus on higher-value work."

Introducing a new CRM required thoughtful change management, especially in a firm with a reputation for long-tenured employees. "We have incredibly loyal staff, some have been here more than 25 years," said Devlin. "But that consistency also meant we needed to focus on training and buy-in."

Devlin led one-on-one and small-group training sessions, pairing hands-on instruction with surveys and ongoing feedback to ensure adoption. "Change management is as much psychology as it is technology," she said. "You need at least one internal cheerleader who really embraces the system and can help

others see the value. Once that happens, adoption takes off."

Engage's intuitive design, strong documentation tools, and integration with Outlook helped accelerate the learning curve. "The system is so intuitive," said Membrino. "Once people started using it, they realized how much time it was saving them."

BFS now uses Engage as the hub of its technology ecosystem, integrating data from Black Diamond, eMoney, and Microsoft tools serving as both an operational control center and a base for future innovation. "With Engage, we've eliminated PDFs, automated our processes, and improved data hygiene," said Devlin. "It's a foundation for scale, and it keeps getting better as Microsoft rolls out enhancements to tools like Copilot."

The BFS team continues to attend Engage workshops to stay up-to-date with new updates and explore new capabilities, including AI-enabled tools and enhanced analytics. "We're excited for what's next," said Membrino. "Copilot and AI-driven insights will play a huge role in the future of how we manage relationships and make decisions."

For Bradley, Foster & Sargent, Black Diamond Engage has transformed CRM from a clunky tool to an operational command center. The project to replace outdated forms became a firmwide movement toward automation, collaboration, and scalability.

"Engage fits our needs perfectly," said Devlin. "It's flexible, intuitive, and built for the way we work. With the combination of Microsoft technology, Black Diamond's wealth management expertise, and incredible support, we've built a system that supports our growth and scale aspirations."

## Benefits

- + 21 automated workflows replacing manual PDF-based processes
- + Significant time savings and improved data hygiene across departments
- + Seamless integration with Microsoft Dynamics, Outlook, and Power Apps
- + Enhanced scalability for continued organic and inorganic growth

To learn more about Bradley, Foster & Sargent, please visit their website at [www.bfsinvest.com](http://www.bfsinvest.com).

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— **Olivia Devlin**  
Client Relationship Specialist,  
Bradley, Foster & Sargent

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