

PRODUCT BRIEF

Engage for Asset Managers

A CRM built for Asset Managers to master the market, optimize channels, and cultivate lasting client relationships.

While portfolio performance often dominates the bottom line in most investment decisions, Asset Managers are realizing that there are other controllable and easily repeatable factors in client satisfaction that can cultivate client loyalty.

Provide optimal distribution for today while keeping one eye on what is coming down the pipeline.

Use your CRM the way you need to. Black Diamond Engage for Asset Managers allows you to modernize your approach to CRM, even if you have an array of profiles and differences across your current distribution footprints, organizational structures, cultures and histories in the retail intermediary market.

Get a holistic view of your clients and understand how to reach them best.

Instead of letting clients define the narrative, take matters into your own hands and improve your proactive communication cadence, never letting people or projects go unnoticed.

- Organize direct and pooled investment data
- Composite data points for quick reference when responding to RFPs

- Automatic roll-up calculations to assess distribution performance across channels
- Automatic, normalized Time and Expense insights

Email Integration to effortlessly file emails directly into Engage so you never miss a thing. Instantly create contacts, update meeting notes, or schedule tasks directly in Outlook.

Workflows to Streamline the tracking, management, and approval processes for client and account transactions, activity, and documentation.

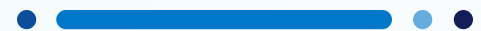
An out-of-the box CRM solution with enterprise level flexibility to easily organize:

Distribution

- Firms
- Channels (a branch of a firm)
- Teams
- Specific Advisors

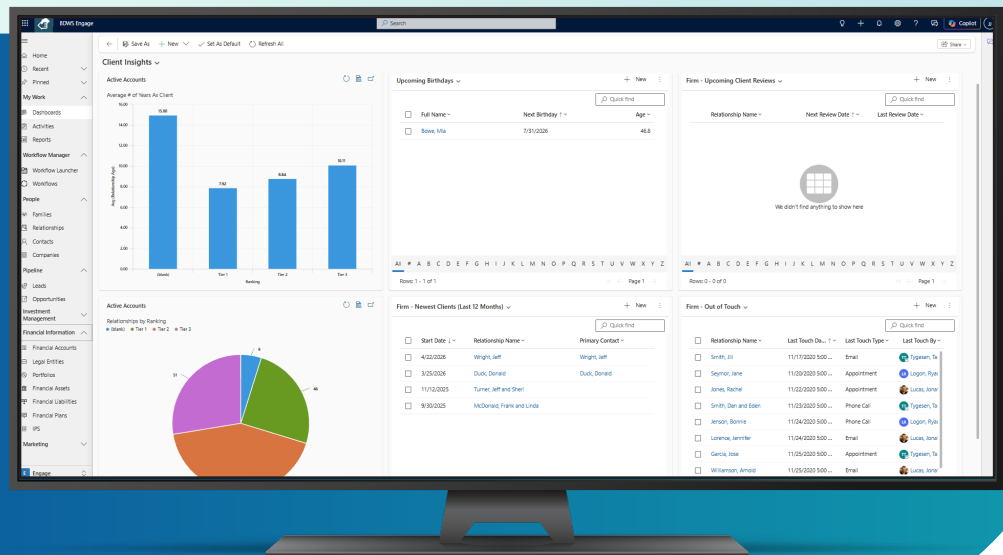
Administration

- Strategies
- Products
- Investment Accounts/Pools



Automatically track all user activity, including investor communications, meetings, and related follow-up tasks.

Engage is built on the Microsoft Dynamics 365 platform, bringing one of the most powerful CRM platforms into a package purpose-built for asset managers.



Best-in-Class Security & Adaptability

Built on the world's most trusted cloud security platform, Engage natively connects into Microsoft Appsource offering hundreds of apps in addition to industry data providers.

More than a CRM, Engage is a centralized hub for your entire business. Capable of sparking digital transformation or upgrading your entire tech stack with one software investment.

Key Benefits

- Native integrations
- Platform built document management
- Business process flows for on-boarding new channel partners
- Mobile/Tablet Access
- Real-Time Dashboards
- 360-degree view of your customers
- Manage global sales, marketing, services, and partners.

Black Diamond Engage includes InTouch, which provides alerts to predict client communications, ensuring a proactive approach to service.

For More Information

If you have questions or would like to learn how SS&C Black Diamond® Wealth Solutions can fulfill your firm's compliance needs, visit ssblackdiamond.com, call 1-800-727-0605, or email info@ssblackdiamond.com.

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