

## CRM SOLUTIONS

# Black Diamond Elements

 Transform Your Day with a Purpose-Built CRM for Financial Services

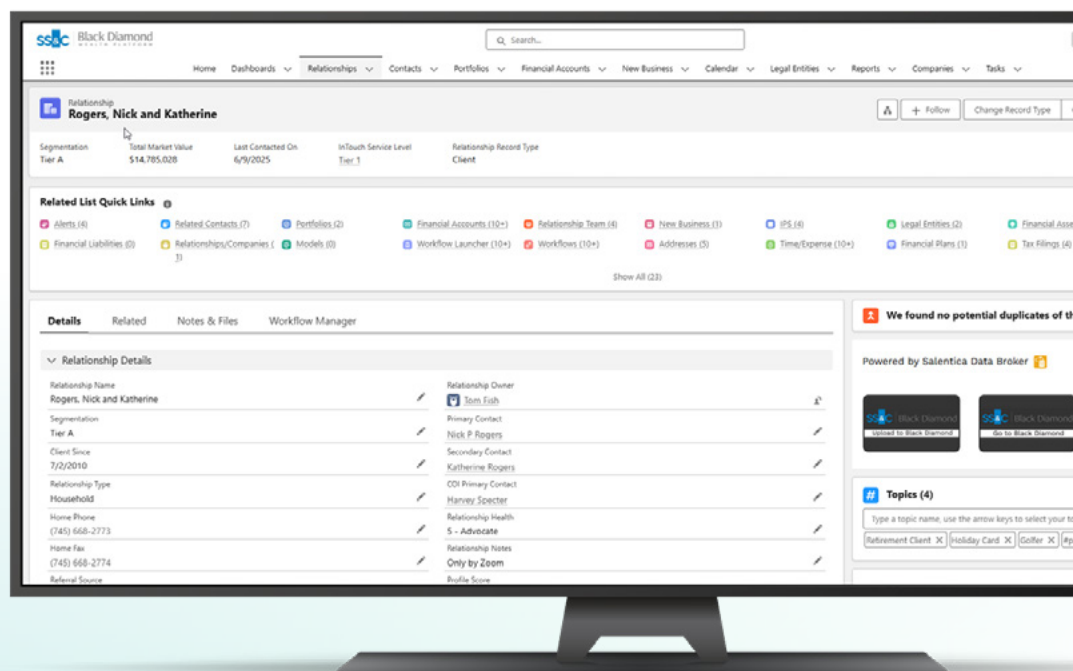
Your CRM should work for you, not create more work. That's the idea behind Black Diamond Elements, a native CRM experience designed to help financial professionals spend less time managing systems and more time deepening relationships. With intelligent automation, real-time collaboration tools, and a simple, intuitive interface, Elements replaces manual tasks and eliminates duplicate data entry, streamlining workflows and enhancing high-touch client engagement. It's your system of record, your growth engine, and your digital transformation catalyst—all in one.

### Operational Workflow and Activity Management

A complete automation hub featuring a no-code visual builder, quick-start templates, a workflow launcher, and status tracking, all delivered through an intuitive interface. Elements empowers users to design thoughtful, repeatable processes by defining steps, assigning tasks, and setting timelines. With Elements, you can centralize key activities, increase accountability, and bring structure to every workflow with flexible Request steps.

### Monitor and Control Client Service Efforts

With Elements, you can track the value of your time with purpose. This CRM helps you associate a dollar amount to individuals, activities, or entire relationships so that you can pinpoint the most financially productive parts of your day and your team's time.



## Kick-Starting Digital Transformation Through the Elements CRM

### From this...

Manual processes and multiple tabs create duplicate data entry

Complex training with long ramp-up times

Systems that are too simple, too complex, or hard to maintain



### ...to this

One-time data entry with information always at your fingertips

Real-time guided workflows and on-demand training

A single system of engagement that evolves with your team

### Activity Timeline & Chatter

You can stay in sync with every client interaction using Elements. You can natively track communications, tasks, and events—past, present, and upcoming—all in one place. Plus, you can easily filter activities and quickly mark items as complete to keep your workflows moving forward.

### Business Development

With Elements, you can natively track information related to Outreach, New Business, and Sponsorships. Elements empowers you to lean on CRM to supplement your business development efforts by streamlining sales development, relationship management, and providing the feature set needed to focus on acquiring, retaining, and developing profitable clients and strategic partners.

### Client Segmentation and Interaction Insights

With this functionality, you can put the client experience at the center of everything you do. Transform traditional activity tracking into a predictive engine, fueling high-touch engagement and helping you stay proactively connected to every relationship.

### Flexibility

Work the way you want, anytime, anywhere. Whether on desktop, mobile, or directly in Outlook, Elements syncs automatically across devices. You can stay connected easily with features like click-to-call and talk-to-text, which keep you moving.

### Personalization

You can tailor your Elements CRM to fit your team's style. Elements lets users customize their home screen, navigation, and page layouts by role or individual preference, so each team member sees what matters most to them.



### For more information

**If you want to learn how SS&C Black Diamond® Wealth Solutions can support your unique advisory firm, please call 1-800-727-0605 or email [info@sscblackdiamond.com](mailto:info@sscblackdiamond.com). You can also visit [sscblackdiamond.com](https://sscblackdiamond.com).**

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