

Listening. Innovating. Leading: The Formula Behind Our Award-Winning Success



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Why was your business able to reach this award-winning level?

It's simple: maintaining an unwavering commitment to listening to our clients. Our advisors provide us with invaluable feedback that serves as a compass for everything we develop. Their insights guide us to identify opportunities and challenges, allowing us to create functionality that meets their needs and exceeds their expectations. A prime example is our Consolidated Reporting feature, which empowers advisors to deliver clear, client-centric reports by combining complex financial data into a single, unified view. This solution streamlines workflows, enhances transparency, and gives clients the clarity they need to make informed decisions. By staying connected to the people who rely on us, we've built solutions like this that deliver tangible results and help our clients succeed. This dedication to collaboration is at the heart of how we continue to be recognized for excellence.

In what ways did your colleagues make a difference?

Our team's ability to simplify the complex is a defining factor in our success. In an industry where technology can often overcomplicate, we focus on delivering intuitive, elegant, and effective solutions. Every member of our product development team understands that the true value of innovation lies in its ability to save time and create efficiency for our clients. They take complex problems, untangle them, and build solutions that fit seamlessly into our clients' workflows. This approach makes a huge difference, ensuring that what we create isn't just functional—it's impactful.

How do you stay ahead in an industry that's constantly evolving?

Our "Challenging the Status Quo" philosophy keeps us on the cutting edge. Complacency isn't an option for us; the minute we stop innovating, we leave room for others to surpass us. That's why we continuously reexamine what we're building next and what we've already delivered. For example, our Consolidated Reporting feature is a cornerstone of SS&C's Black Diamond® Wealth Platform, which supports over 2,700 firms managing \$3.3 trillion in assets and generating more than 7 million client reports annually. This level of scalability and performance empowers advisors to deliver clear, actionable insights to their clients while maintaining operational efficiency.

In what ways were you able to deal with challenges and problems this time around? What lessons have you learned?

Challenges are a natural part of innovation. Development projects rarely go according to plan, and you must be prepared for the landscape to shift multiple times. For us, staying agile is key. When hurdles appear, we adapt quickly while keeping our end goals in sight. These moments of change often lead to better outcomes because they force us to refine our solutions in ways we hadn't anticipated. The lesson is simple: be flexible, stay focused, and embrace the process. That mindset is what enables us to continue delivering excellence, even when the road gets bumpy.