

# REIMAGINING THE CLIENT EXPERIENCE IN WEALTH MANAGEMENT

Remain on top of current trends to capitalise on market opportunities.

Our Gold Partner Status with Microsoft enables us to deliver technologies, such as Microsoft Azure and 365 as well as Dynamics 365, to reimagine your clients' experience.

## CHALLENGES

The Wealth Management industry is changing with a new generation of investors whose expectations are shaped by new technologies.

Here client experience becomes a competitive differentiator that can build loyalty and trust.

Globalisation and regulatory complexity are driving the continued need for transparency and simplification.

New initiatives increase data volumes and complexity and make it harder to break down siloed data and maintain high-quality data.

Technology can be a key enabler to increase agility and improve client engagement.

## CLIENT CENTRICITY

Microsoft technologies enable wealth management firms to reimagine the client experience and client centricity for a digital world.

Technologies, such as Dynamics and Microsoft 365 and Azure, allow firms to better comprehend client goals with a single, unified view, delivering high quality advice and guidance.

Leveraging insights from across the firm differentiates your client service from the competition and allows you to capture market share.

Gold  
Microsoft Partner



## OUR MICROSOFT PARTNERSHIP

C5 are a Microsoft Enterprise Partner and ranked within the top 1% of Microsoft partners in the UK by capability.

C5 Alliance are a Microsoft Gold Partner with 9 Gold certifications.



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# Key solutions at a glance

We can help your organisation move towards, and ultimately become more client centric to deliver excellent experiences.



## ACTIONABLE INSIGHTS

Leverage Microsoft Azure to provide high-value, personalised investment guidance to every client driven by advanced analytics and predictive intelligence based on a client's behavioral patterns and financial aspirations.

Use a personalised, real-time dashboard to attain a holistic, comprehensive view of a client's financial journey and create value for clients.



## DEEPER UNDERSTANDING

Deepen your understanding by tracking the details of every interaction from every channel to deliver contextual, connected experiences.

You can unify data from disparate and siloed sources and centralise client knowledge to enable rich client relationships and personalised investment experiences.



## SEAMLESS INTEGRATION

With Dynamics 365 you can empower your organisation by choosing your preferred channel of engagement, including bots, human agents, voice, and seamlessly switch between channels without losing context or starting over.

This improves brand reputation, client satisfaction, and loyalty to the firm.



## CUSTOMISABLE SOLUTIONS

Offer tailored investment guidance, targeted recommendations.

Mobility, productivity, and CRM solutions, like Microsoft 365 and Dynamics 365, complement each other to help advisors increase client satisfaction and improve upsell and cross-sell performance by providing a single, complete view of each client, their risk tolerance, and their ultimate goals.

## SUMMARY

Personalised and valuable client interactions are driven by solutions that allow firms to engage clients, enable a connected and collaborative digital workplace, and transform into a digital business with connected and open systems.

Through a combination of Microsoft and our technology skills, you can convert stagnant and siloed data into insight, transform ideas into customized action, and turn change into an opportunity.



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