

WDX1 comprises 3 best practice modules that can be used standalone or combined to optimise cost-income ratios and deliver outstanding service throughout the entire client lifecycle.



## WHAT PROBLEM DOES IT SOLVE?

Wealth management is fraught with manual processes, disparate systems and unconnected data silos. The job of engaging, onboarding and managing clients is often inefficient, costly and frustrating for both advisors and clients. There is no one place to go to for a complete view of a client's journey with your firm, or data to guide next best recommendations. Compliance gaps can easily emerge, putting your business at risk.

Underpinned by Microsoft Dynamics, WDX1 orchestrates end-to-end Client Lifecycle Management (CLM) processes as a unified experience that is operationally efficient, fully-compliant and empowers relationship managers to focus entirely on client satisfaction.

## KEY FEATURES

### + SPANS THE FULL CLIENT LIFECYCLE

Standalone modules or fully-integrated solution: Engage, Onboard, Manage

### + 360-DEGREE CLIENT VIEW

A single sign-in, holistic view spanning every aspect of your client's journey

### + REPORTING & ANALYTICS

Empower users with intelligent insights delivered via role-based dashboards

### + AUTOMATED WORKFLOWS

A single workflow engine that controls all end-to-end processes

### + COMPREHENSIVE COMPLIANCE

Built in compliance checks and balances, with automated alerts and execution

### + END-TO-END INTELLIGENCE

Integrated and proven best-in-class AI technologies for smarter decision making

# KEY BENEFITS

A single workflow engine that controls all end-to-end processes, in parallel.

## + OPTIMISE COST-INCOME RATIO

Achieve AUM growth and book revenues faster, at lower cost

## + ENRICH CLIENT EXPERIENCE

Deliver frictionless, consistent and personalised client journeys

## + RE-USE CLIENT DATA

Capture client and compliance data once, re-use across the client lifecycle

## + RADICALLY CUT COSTS

Reduce routine administration and reallocate resources to revenue-generating work

## + EASE & SHORTEN ONBOARDING

Save time and reduce friction through onboarding process automation

## + PROACTIVE CLIENT MANAGEMENT

Know the status of every client and address issues and opportunities as they arise

## + ENSURE CONSISTENT SERVICE

Optimise service quality from initial engagement through and beyond

## + IMPROVE COMPLIANCE

Capture compliance data at every stage of the client lifecycle



WDXI ORCHESTRATES 3 CORE MODULES OF CYCLE LIFECYCLE MANAGEMENT (CLM) INTO ONE INTEGRATED SOLUTION



**(available independently, or even better together)**

## CONTACT US

Interested in learning more about Client Lifecycle Management?