

2008

# Extraordinary Technology

## Wealth management infrastructure.

Upgrading the processes and technology infrastructure to ensure a successful wealth management service offering.



Sales Optimization: Case Study  
Customer Research Center



A retirement services provider asked CRC partners to lead an overhaul of the firm's data, technology, and service legacy infrastructure. Strategic growth of investment advisers required a robust platform for front and back-office support. CRC Partners worked on the key technology components: supporting workflows, sales management analytics, financial planning tools, asset allocation engines, and integration with the legacy finance and accounting platforms. Hundreds of middle and back office processes were streamlined, issues related to data sourcing and consistency were evaluated, and a phased multi-year plan was put into effect to improve data consistency and accuracy. Procedures to support internal guidelines and regulatory compliance were strengthened. A centralized development group and off-site support were developed to allow field-based investment advisers to maximize their ability to grow the client base.

# Customer Research Center

Experts in  
sales process  
optimization.

**"The enhanced technology infrastructure allowed us to reach out to 40% of our clients targeted as high net-worth individuals within 12 months, and all of the target clients over the next year. The improved infrastructure enables us to convert 20% of the target client base into wealth management clients."**

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