

Sontag Advisorywww.sontagadvisory.com**Challenges**

- Vendors not understanding their business and industry
- Operating efficiently without sacrificing service
- Lack of client communications

Solution

- Implementing Salentica CRM, which is built on Microsoft Dynamics 365/CRM and made to serve the needs of advisors and wealth managers
- Integrating ClickDimensions marketing automation with Salentica CRM
- Utilizing data from the two systems combined to achieve business goals

Benefits

- Integrated solution has streamlined processes and provides a singular view into customer relationships for every member of the firm
- Increased efficiency and client engagement
- Ability to create client communications quickly and easily

From their offices in New York City, Sontag Advisory serves as a wealth manager, investment advisor, consultant and fiduciary to clients in more than 30 states. Since 1995, they have been devoted to providing clients with financial peace of mind through trustworthy advice and passionate service.

Missing the Right Fit

As a wealth management and investment advisor, Sontag Advisory needs deep customer insights in order to help their clients make sound financial decisions for themselves, their families and their futures. This level of understanding and insight requires business solutions tailor-made for their firm and industry.

In 2013, Sontag Advisory was using Microsoft Dynamics CRM, but felt that the solution could do more for them. "At the time, we were working with another vendor for Microsoft Dynamics, and we were very frustrated with the vendor's lack of understanding of our business," recalled Eric Sontag, the firm's Chief Operating Officer and Managing Director.

The firm, which takes pride in delivering outstanding client service, needs to operate efficiently. To support their long-term success and growth, they were looking for a solution that would allow them to maximize productivity while still delivering stellar service.

In addition, Sontag Advisory sought a way to communicate with their clients more effectively and frequently through email marketing.

Implementing Specialized Solutions

First on Sontag Advisory's to-do list was to find a new Microsoft Dynamics CRM partner. By asking other investment firms, they discovered Salentica, a CRM solution made exclusively for wealth management firms.

"We selected Salentica because of their expertise, understanding of our industry's needs and the enhanced technology built into their Dynamics CRM solution based on our business model. Every single member of our firm has and needs a Salentica CRM license because it impacts all areas of our business," said Sontag.

While Salentica CRM helps Sontag Advisory with everything from business

“The integration of Salentica CRM and ClickDimensions has become a critical component of our client service model.”

Eric Sontag
Chief Operating Officer and
Managing Director
Sontag Advisory

intelligence to operations to client service, the firm was still lacking in one area – marketing. As a ClickDimensions partner and customer, Salentica could help there too, by making the recommendation to implement the only marketing automation solution natively built inside Dynamics 365/CRM.

“Following Salentica’s recommendation, we took a look at ClickDimensions,” remarked Sontag. “We were impressed by the functionality, integration with Dynamics, and deep library of help articles and videos, and knew it was the perfect solution for us.”

ClickDimensions would allow Sontag Advisory to ramp up their client communications while delivering unparalleled access to client data in CRM for better segmentation, personalization and marketing success. In addition, with a wide range of essential marketing tools, the solution gave the firm the ability to start smaller with their marketing efforts and grow into broader outreach.

Changing the Way They do Business

“We have historically favored a more client-by-client approach to outreach and communication, but the results we are seeing thus far from the integration between Salentica CRM and ClickDimensions are quickly changing that view,” said Sontag.

Members of the firm can easily set up email templates and customize them for client or prospect newsletters or other communications, which Sontag noted has increased customer engagement and allowed the firm to serve their clients more effectively.

“A recent example of this was communicating after the Equifax data breach,” Sontag commented. “The morning after news of the event, we sent an email via ClickDimensions to our clients with our thoughts, recommendations and various links for them to take action. Our open and click rates were the highest they have ever been, and we immediately received positive client feedback with respect to the speed of our notification.”

Sontag sees a bright future for the firm’s use of Salentica CRM and ClickDimensions. “We know there is so much more we can do with this powerful integration and hope to roll out many of those features over time.”



Visit www.clickdimensions.com to learn more about how our solutions can help your organization.