SS&C | Black Diamond WEALTH SOLUTIONS

From Contact to Client

Seven Steps to Win Prospects with Experience, Not Just Products

You can't compete on product or price. In a world where investment products are increasingly commoditized, it's the experience you create that matters for potential clients.

This guide explores the unique capabilities of SS&C Black Diamond® Wealth Solutions, demonstrating how functionality can be leveraged to establish trust, showcase value, and accelerate conversions at every stage of the prospect journey. From the moment you meet a new contact to the day they become a loyal client, each interaction can reinforce your value and deepen their confidence in your firm.

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2. Open the Door with Timeline
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The Prospect Journey: A New Playbook for Engagement

Cold coffee meetings. Static PDFs. Endless back-and-forth email chains. For too long, these outdated prospecting methods have been the default. Today's investors expect more, and they won't wait for advisors stuck in the past.

Today's prospects expect interactions that feel like the best digital experiences—responsive, intuitive, and secure—just like their favorite banking or mobile apps.

By combining capabilities such as CRM, client portal, document vault, planning integrations, and proposal generation tools within Black Diamond, advisors can create a connected, dynamic experience that earns trust from the very first interaction. Each tool builds on the next, conveying a powerful story to clients:

"We see you. We understand you. And we're ready to help you reach your goals."

1 Create a CRM Contact

First impressions matter. In prospect management, that initial interaction can set the tone for everything that follows.

Black Diamond CRM Solutions make it easy to start strong. Advisors log a new contact, assign attributes, and immediately begin tracking engagement. Whether a prospect downloads a guide, attends a webinar, or comes through a referral, that context becomes the foundation for personalized follow-up.

From there, advisors can automate welcome emails, assign follow-up tasks, and segment contacts by interest, stage, or fit, ensuring that no lead slips through the cracks. Each interaction thus feels timely, meaningful, and personal.

The segmentation capabilities also allow advisors to fine-tune their messaging, sending tailored invitations, updates, or resources based on each prospect's unique profile. Imagine automatically inviting a webinar attendee to a follow-up planning session based on their expressed interests.

2 Open the Door with Timeline

Once a prospect signals interest, it's time to deepen the relationship, and Black Diamond's client experience tools make it seamless. Advisors can immediately extend access to two powerful features with the Client Experience Portal: Timeline and Vault.

Timeline creates a compliant, centralized record of communication. It enables advisors to share quarterly commentaries, planning resources, or personalized insights directly within the portal, offering prospects a transparent view of how the advisor operates.

Many advisors also use Timeline to celebrate personal milestones, reinforcing a sense of connection before a formal engagement begins. For example, when a prospect shares exciting life news—a wedding, a new home, or a baby—an advisor can quickly send a personalized congratulations message through the portal. These thoughtful touches make prospects feel truly seen and valued.

3 Secure Clients and Data with Vault

After establishing an initial connection, the next step is building confidence, both in the advisor and in the process. That's where Vault comes in. Part of the Black Diamond Client Experience Portal, Vault is a secure and intuitive hub for document sharing that signals professionalism from the start.

Vault complements Timeline by providing a secure repository for sensitive documents. Whether it's 401(k) statements, trust agreements, insurance policies, or tax returns, Vault enables secure, professional exchanges that allow advisors to begin meaningful analysis early without waiting for complete onboarding.

Together, Timeline and Vault create an integrated foundation for lasting trust, fostering clear communication, secure collaboration, and laying the groundwork for a lasting relationship. In an era where cybersecurity and client confidence are paramount, offering a seamless, elegant experience sets advisors apart from the start.

4 Personalize the Conversation with Sample Reports

Imagine showing a prospect a glimpse of their financial future before they even signed on. That's the power of Black Diamond's Client Reports in sample mode.

Advisors can create anonymized mock reports modeled after real client profiles, offering prospects a vivid preview of the service and insights they can expect. These reports are tailored to a prospect's stage of life or primary goal. For instance, a retiree may wish to see income projections, withdrawal strategies, and tax implications. A younger client might want to see dynamic asset allocation models and long-term growth forecasts.

By aligning each sample report with the prospect's unique circumstances, advisors make their value proposition tangible and personal. It's no longer about promises; it's about painting a picture of what their experience will genuinely feel like.

5 Craft the Right Proposal, Powered by Data

What if a simple PDF statement could unlock new opportunities for your prospects? By turning data into a vision for the future, advisors build emotional buy-in early and lay the groundwork for a strong, lasting advisory relationship.

With Black Diamond Proposal Generation, advisors can transform static account summaries into personalized investment strategy comparisons. By dragging and dropping from Excel, advisors can quickly and accurately extract holdings. This allows them to create clear, side-by-side views of a prospect's current portfolio and a proposed future state that better aligns with their goals.

This tool empowers advisors to:

- Highlight risk exposures that may be hiding in plain sight
- Identify opportunities to diversify concentrated holdings
- Showcase projected improvements to efficiency, growth, or income

The resulting proposal is more than just numbers—it's a powerful narrative that resonates:

"Here is where you are today. Here is where you should be. Let us guide you there."

6 Extend the Relationship Through Integrated Planning

Planning is no longer an optional service; it's an essential expectation, especially among today's younger and next-generation clients. Prospects now evaluate advisors not only on investment returns but also on how effectively they help chart a path through major milestones, such as retirement, education, estate transfer, and charitable giving.

Black Diamond's seamless integrations with leading planning platforms, such as RightCapital and MoneyGuidePro, enable advisors to showcase key attributes from a foundational financial plan.

This is an ideal way to engage early-stage prospects as these planning visuals help prospects:

- See the bigger picture of their wealth management journey
- Understand trade-offs and opportunities ahead
- Visualize their future goals in actionable terms

Offering preliminary planning materials signals that you're invested in their long-term success, not just managing assets. It invites prospects to picture themselves building their future with you, laying the foundation for loyalty before the first account is even opened.

7 Automate What Matters

Automation is your silent partner in delivering world-class service. It ensures consistency, saves time, and elevates the client experience across the board. Within a Black Diamond CRM, advisors can:

- Trigger secure document requests when a contact becomes a prospect.
- Set reminders for critical check-ins and next steps.
- Automate segmentation based on behavior, demographics, or engagement.
- Launch nurturing sequences across multiple channels, including email and client portal communications, helping build momentum with prospects at every stage.

Imagine cutting onboarding time in half while still personalizing every touchpoint. When implemented thoughtfully, automation helps advisors reclaim hours each week and reinvest that time into relationship-building activities that truly move the needle.

Prospecting with Purpose

Winning a prospect's business isn't about closing a deal. It's about building trust that lasts. Advisors who succeed focus on creating experiences that feel personal, secure, and consistently valuable from the very first interaction.

SS&C Black Diamond® Wealth Solutions enables this approach. It helps advisors earn trust from the first conversation, offering personalized planning, professional communication, and a streamlined path from prospect to client. Advisors who invest in delivering superior experiences today will be the ones leading the industry tomorrow.

Ready to Elevate Your Prospect Experience?

To learn how SS&C Black Diamond® Wealth Solutions can support your unique advisory business, request a personal demo, call 1-800-727-0605, or email info@sscblackdiamond.com today.