

## The Impact of CRM in Advisor Technology

**100%**



Advisory firms with over \$5M in revenue use a CRM\*

CRM is a critical tool for firms seeking to grow their business with scale.

**94%**



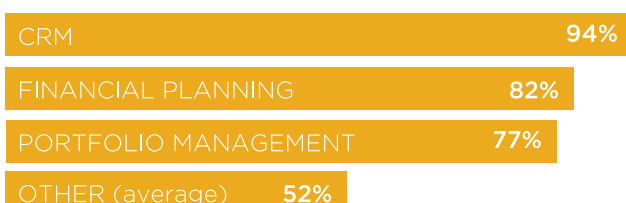
Advisory firms estimated to be using a CRM solution\*\*

### THE TOP 4 BENEFITS OF A CRM

- Improved Client Service
- Efficiency Boost
- Increased Revenue
- Business Insights

### SOFTWARE USAGE

A CRM consistently ranks as the most widely used technology tool among RIAs\*



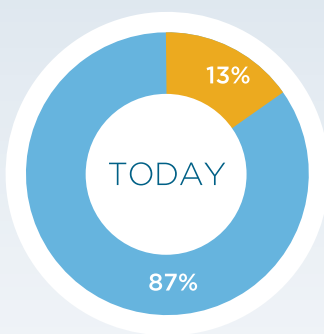
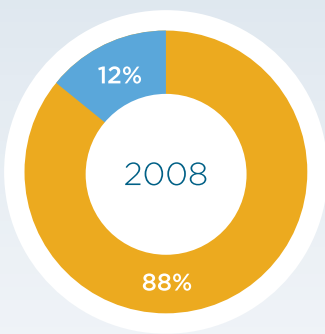
### CRM SYSTEM INTEGRATION

CRM integration into core business operations outranks other system integrations for the following firm types; proving to be the hub of data for firms.\*



IN 2008, 12% OF BUSINESSES USED CLOUD BASED CRM – TODAY IT'S 87%\*\*\*

● On-Premise ● Cloud-Based



SALENTICA IS AVAILABLE ON THE TOP 2 LEADING CRM PLATFORMS IN THE INDUSTRY



Salesforce®



Microsoft® Dynamics 365

### DID YOU KNOW?

#### MICROSOFT DYNAMICS 365

Each sales person can save approximately **3 hours per week** due to the increased efficiency of capturing data with CRM, **gaining back nearly 8% of the week.**\*\*

#### SALESFORCE

A CRM with an intuitive user interface enables firms to improve sales productivity, which can lead to increased **close rates of 25%.**\*\*

### SALENTICA CRM USERS

38% of advisory firms with over \$5M in revenue use Salentica CRM. At 28%, majority of the top performing financial advisors use Salentica as their CRM solution.\*



Salentica has over **20** years of experience exclusively in CRM for wealth management, with **over 6,500** users today.

**6,500**

To learn more about Salentica solutions, visit us at [www.salentica.com](http://www.salentica.com) or call 1-800-727-0605.

Sources

\* Investment News Advisor Technology Study for 2017  
 \*\* Nucleus Research Enterprise Technology Buyer's Guide 2018  
 \*\*\* Software Advice™ Cloud vs. On-Premise Software