



Capital Investment Counsel Turns to Microsoft Dynamics CRM & NexusTek to Grow Their Business, Streamline Operations & Improve the Client Experience

BACKGROUND

With offices in Denver and Scottsdale, Capital Investment Counsel is one of the region's largest wealth management firms, handling more than \$1.7 billion in assets for individuals, corporations, foundations and public entities nationwide. The firm's expertise and down-to-earth, hands-on approach have earned the trust and respect of countless clients since 1990.

While Capital Investment Counsel has a reputation for providing keen insight and objective advice, wealth management firms need more than expert portfolio management skills to grow their business and their clients' net worth; they need to actively manage customer relationships to deliver personalized services and advice, identify new opportunities, and comply with regulatory requirements.

BUSINESS NEED

Capital Investment Counsel was using ACT! to maintain basic client information and wanted a more robust solution that would help them:

- Centralize and consolidate client information into a single, organized data source allowing advisors to address questions in a few quick clicks.
- Gain a holistic view of client accounts, including investments not managed by the firm, to identify new opportunities.
- Create workflows to streamline on-boarding and portfolio management.
- More effectively manage a family of related clients and generate a complete, cross-generational view of their assets.
- Easily generate reports to address regulatory requirements.
- Make a smooth transition from ACT!

SOLUTION

Capital Investment Counsel turned to their trusted IT partner, NexusTek, for help selecting and implementing the right customer relationship management (CRM) solution. They considered an industry specific application from Junxure®, but ultimately chose Microsoft Dynamics CRM because it is easily customized to their specific needs and integrates seamlessly with Microsoft Office as well as other industry related applications. Scribe Migrate was selected as the tool to transition from ACT! to Microsoft CRM for its product-specific integration functionality.

While there are a number of Microsoft partners that implement Microsoft Dynamics CRM, Capital Investment Counsel chose NexusTek for their business acumen, product expertise, local presence and responsive, hands-on



approach to customer service. NexusTek had proven to be a true business partner, not just an IT vendor, and provided the same type of relationship that Capital Investment Counsel seeks with their own clients.

RESULTS

Because Microsoft Dynamics CRM works as a natural extension of the tools their advisors use every day, Capital Investment Council has benefited from lower training costs, increased user adoption, reduced application-switching, and a fast return on investment. Additionally, Capital Investment Council is now able to:

- Easily and securely access Microsoft Dynamics CRM from within Microsoft Outlook or any internet connection
- Quickly view client information from a global perspective with intuitive drill-down capabilities into product, historical client interactions, and service details
- View dashboard summaries of portfolio information, asset allocation and reporting for a quick snapshot of each client's portfolio account details
- Eliminate hours of busywork by automatically generating timely and personalized client emails, such as monthly statements
- Manage associated legal instruments and related sub-documents
- Implement client management workflows that eliminate time consuming administrative tasks.
- Create timely reports: Client Profile, Client List by AUM, Top Clients by AUM, Referrals by Company/Contact
- Leverage relationships with referral sources and within client family structures to drive more business
- Manage the complexities of third party relationships including attorneys, accountants, consultants, business brokers, trustees, custodians, etc.
- Integrate with 3rd party portfolio management systems allowing for updated client and portfolio information

CUSTOMER QUOTE

"NexusTek is extremely responsive and knowledgeable! They did a wonderful job building our IT infrastructure and provided superior support. As a result, we chose NexusTek to implement and support our CRM system.

With NexusTek as a partner, I can continue to do the things I do best – manage the business. They've proven themselves. I know they'll be there when I need them."

Keenan McNeace, COO
Capital Investment Counsel

**Type**

Privately Held

Company Size

11-50 employees

Website

www.cicinvestments.com

Industry

Financial Services

Solution

Microsoft Dynamics CRM 4.0

SCRIBE