

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



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

– Keenan McNeace, COO, Capital Investment Counsel

Overview

Locations: Denver, CO, Scottsdale, AZ

Type: Privately Held

Company Size: 11-50 employees

Industry: Financial Services

Website: www.cicinvestments.com

Customer Profile:

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 clients since 1990.

Business Situation:

Capital Investment Counsel was using an outmoded system to manage basic client information. They wanted to update this system and expand its capabilities.

Business Need

By using ACT! and other common applications to maintain client information, Capital Investment Counsel was struggling to accommodate basic customer service and compliance needs. Customer data was scattered and stored in multiple applications and databases making it almost impossible for staff to access and share key information and identify new opportunities. Relationships with third-party referral organizations were suffering due to the lack of streamlined communication and information availability. The company was wasting resources manually generating reports while struggling to address regulatory requirements. The company recognized the need to revamp this outmoded information management system but had concerns around employee adoption of a new system and loss of productivity related to the learning curve.

Solution

Capital Investment Counsel turned to 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 was 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 Dynamics CRM for its product-specific integration functionality.

Solution:

Capital Investment Counsel implemented Microsoft Dynamics CRM with SCRIBE Migrate® for data migration.

Benefits:

- Vastly improved management of customer information.
- Improved relationships with referral sources and increased business with them.
- Improved client and portfolio information update processes.

“ With NexusTek as a partner, I can continue to do the thing I do best - manage the business. They’ve proved themselves. I know they’ll be there when I need them.”

Results

Accessing Microsoft Dynamics CRM directly from within Microsoft Outlook allows employees to view dashboard summaries of portfolio information, provide better customer service, and identify opportunities that would have previously been invisible. This, along with Dynamics CRM automated reports and automated process workflows has eliminated hours of time that had previously been spent on data-entry, application management, and reporting. Information requests for compliance and customer service matters are processed quickly and efficiently from within a single system. Capital Investment Counsel is able to effectively manage third-party relationships including attorneys, accountants, business brokers, trustees, and custodians, improving their referral relationships and keeping them at the forefront of their business. Because Microsoft Dynamics CRM works as a natural extension of the tools their advisors use every day, Capital Investment Counsel has benefited from lower training costs, increased user adoption, reduced application-switching, and a fast return on investment.

The company has saved money by foregoing an expensive upgrade to their prior email platform while dramatically reducing the administrative burden of managing an outdated system.

Employees are now able to remotely access their email, Office applications, calendars and files via a single, cloud-based platform, allowing them to be more productive – anytime, anywhere – away from the office or on the road.

About NexusTek

NexusTek, an award-winning Microsoft Gold Partner, provides small and medium-sized businesses a trusted resource to optimize and manage their IT environments, ensuring business continuity and driving productivity. From managed IT services to cloud solutions and customized business software implementations, NexusTek employs top talent, offers personalized attention, and brings nearly 22 years implementing technology best practices for companies nationwide. For more information, visit www.nexustek.com.