



Custom CRM Solution: 3x Revenue Growth for Sterling Capital Management

A strategic partnership that transformed client management and advisor productivity for a mid-sized investment firm, driving exceptional business growth within the first year of implementation.

The Challenge: Fragmented Systems Limiting Growth

Fragmented Client Data

Client information scattered across spreadsheets, email, and legacy systems, preventing a unified view of client relationships.

Manual Reporting Burden

Advisors spent 15+ hours weekly generating client reports, drastically reducing time available for client service.

Limited Client Insights

No holistic view of client portfolios, interactions, or preferences to guide strategic decisions.

Revenue Leakage

40% of qualified leads lost due to poor follow-up processes, with significant missed opportunities for cross-selling.

Sterling Capital Management needed a solution that would address these critical issues while maintaining strict compliance with SEC and FINRA regulations.

Our Strategic Approach

01

Discovery & Analysis

30+ stakeholder workshops, mapping 75 distinct workflows, and comprehensive compliance assessment.

03

Development & Implementation

Custom platform built on Salesforce Financial Services Cloud with extensive industry-specific customizations.

02

Solution Design

Advisor-centric interface with built-in compliance controls, Client 360° View, and integration-first architecture.



Our team conducting workflow mapping sessions with Sterling Capital advisors

Core CRM Features: Beyond Standard Solutions



Unified Client Profiles

Comprehensive view including demographics, risk tolerance, goals, and preferences with householding capabilities to group related accounts.



Advisor Productivity

Automated reporting, workflow automation, intelligent task management, and full-featured mobile app for on-the-go client management.

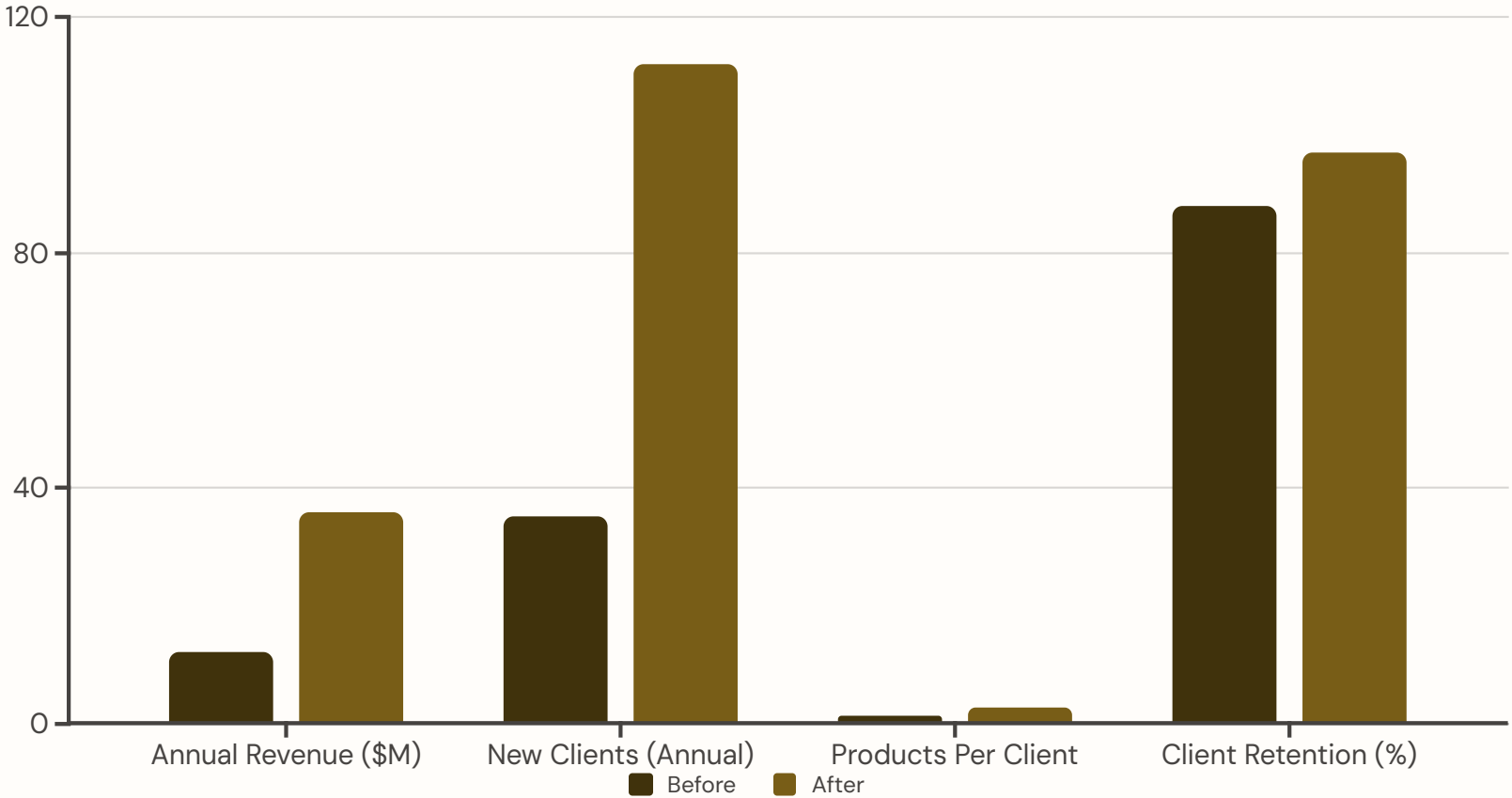


Revenue Generation

AI-powered recommendation engine, opportunity pipeline tracking, referral management, and automated fee calculation based on assets under management.

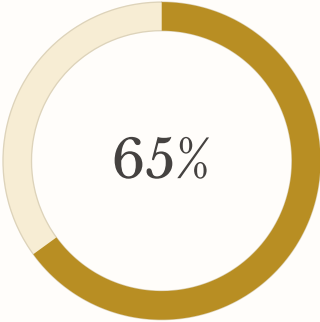
📄 **Integration Strategy:** Seamless connections with portfolio management systems (Advent, Black Diamond), financial planning tools (MoneyGuidePro, eMoney), custodian platforms (Schwab, Fidelity, Pershing), and compliance systems.

Remarkable Business Impact



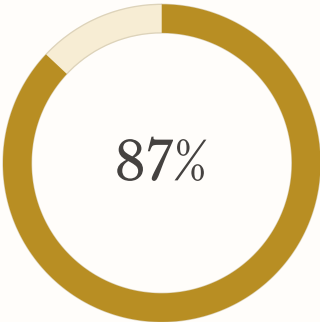
The custom CRM solution delivered **3x revenue growth** in the first year, with assets under management increasing from \$850M to \$2.1B—a 147% improvement. Lead conversion rates jumped from 25% to 68%, while client satisfaction scores improved from 7.2/10 to 9.4/10.

Operational Efficiency Transformation



Advisor Productivity

Increase in productive client engagement time through automated workflows



Reporting Time

Reduction from 15+ hours/week to just 2 hours/week per advisor



Advisors now spend more time on high-value client interactions rather than administrative tasks.

Client response times decreased from 24 hours to under 2 hours, while meeting preparation time dropped from 45 minutes to just 10 minutes per client. Portfolio reviews increased from quarterly to monthly for top-tier clients.

Client Experience Enhancement

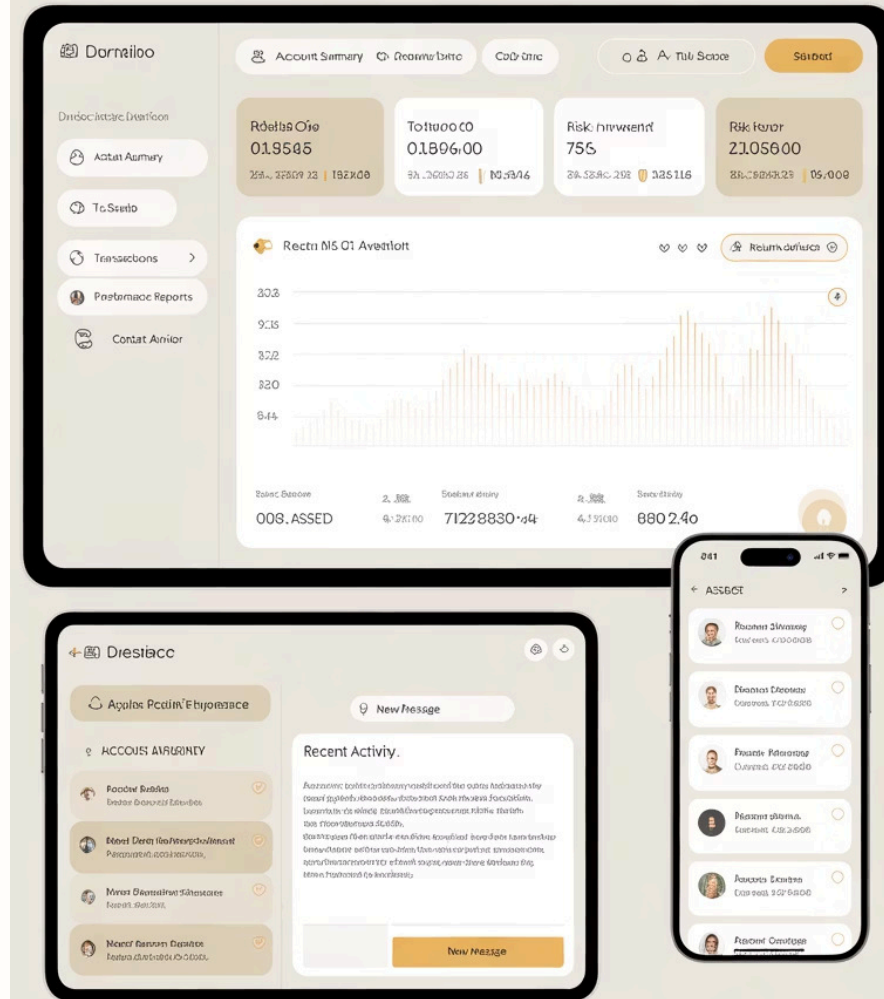
Before Implementation:

- Inconsistent client communications
- Limited visibility into portfolio performance
- Paper-based documentation
- Quarterly portfolio reviews only
- 24-hour average response time

After Implementation:

- Unified communication through client portal
- Real-time portfolio insights and performance tracking
- Secure digital document repository
- Monthly portfolio reviews for top clients
- **2-hour average response time**

Digital adoption reached 78% of clients actively using the client portal within the first six months of launch.



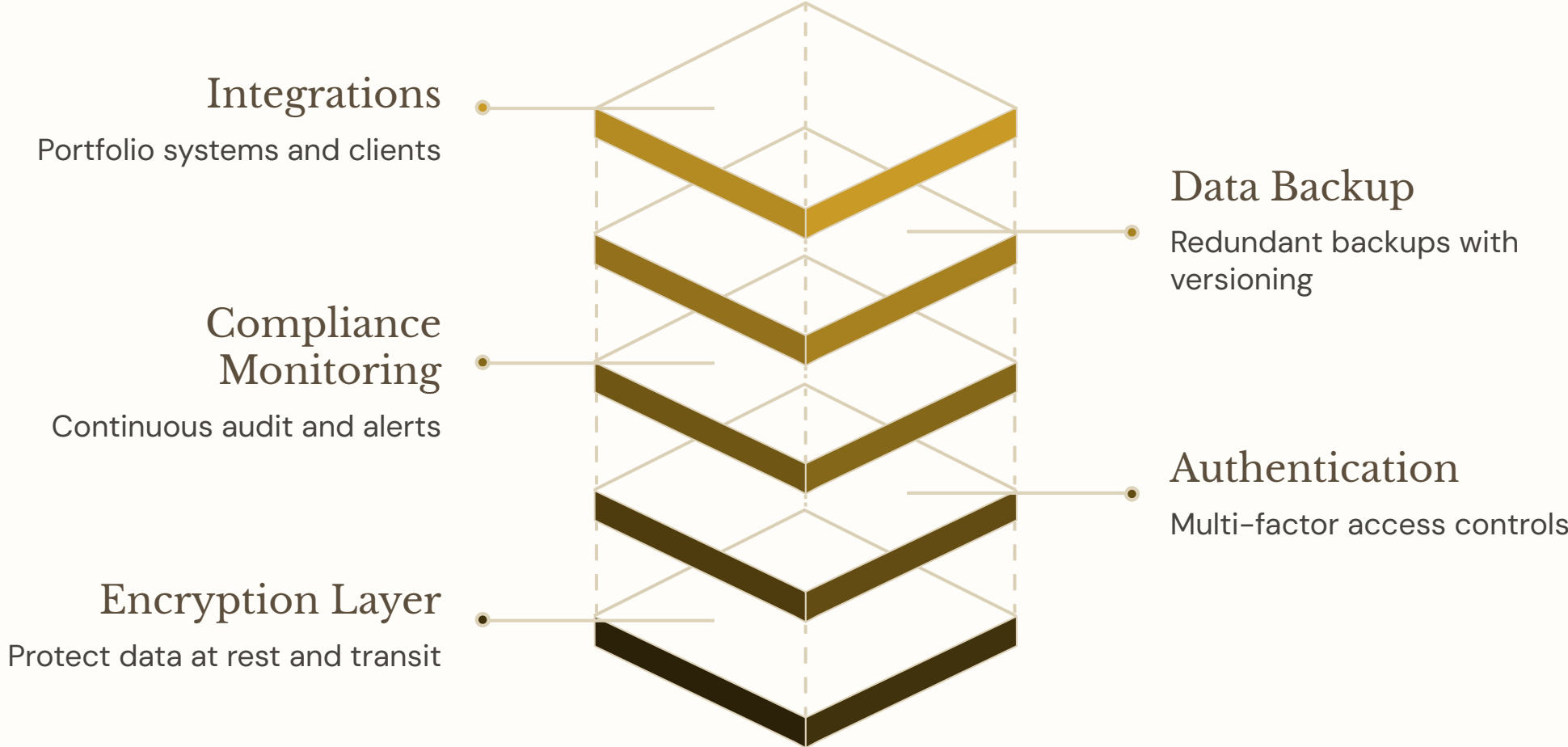
Technical Achievements

System Performance

- Sub-second response for 98% of transactions
- Processing 500,000+ daily transactions with zero data loss
- 99.99% uptime since deployment
- Architecture supporting 10x growth in clients and assets

Security & Compliance

- End-to-end encryption with SOC 2 Type II certification
- Role-based permissions with multi-factor authentication
- Comprehensive audit trails for all system activities
- AI-powered compliance monitoring of communications



Key Success Factors & Lessons Learned



Industry-Specific Design

Generic CRM solutions don't address the unique needs of investment management firms. Our industry-focused approach was crucial.



Data Quality Focus

Investment decisions depend on accurate, timely data. Robust data governance was essential for maintaining integrity.



Embedded Compliance

Regulatory requirements shaped system design from the start, rather than being added as an afterthought.

"The custom CRM solution has transformed our business beyond our expectations. The 3x revenue growth in the first year is remarkable, but equally important is how it has enhanced our client relationships."

– Jennifer Williams, Managing Partner, Sterling Capital Management

Future Roadmap: Building on Success



1 AI-Powered Insights

Advanced machine learning for market trends and client behavior prediction

2 Enhanced Client Portal

Expanded self-service capabilities and integrated financial planning tools

3 Alternative Investments Support

Comprehensive tracking for private equity, real estate, and other alternative assets

4 Digital Onboarding

Fully digital client acquisition and onboarding workflows

This case study demonstrates how a strategic approach to custom CRM development—focused on industry-specific workflows, advisor productivity, and client experience—can transform an investment firm's performance and position it for continued growth.