Onboarding Wealth Management Clients

A midsize regional bank engaged W-Systems to implement Sugar with a focus on onboarding and managing their private banking clients. W-Systems created an easy to use client profile, automated workflow steps for collection of key documents and integration to a Fiserv backend core banking platform and portfolio management system.

With this new system, the private bankers gained a system that was more adaptable than their core banking system and helps them carefully control the relationship process.

SugarCRM enables businesses to create customers for life with the world's first intelligent, no touch customer experience (CX) platform.