

Empowering a National Wealth Management Firm to Drive Growth with ONEsuite

A national wealth management firm recognized the need to better understand and engage its clients to drive sustainable growth. While the firm offered a broad portfolio of financial products and services, it lacked the tools to capture meaningful insights into client behavior, preferences, and decision-making processes. To address this gap and unlock new opportunities for deposit and asset growth, the firm turned to O'Neil Digital Solutions and the powerful capabilities of the ONEsuite platform.

CLIENT

A National Wealth Management Firm

FOCUS

Grow deposits and assets under management

OUTCOME

Grow deposits and assets under management

The Challenges

A leading national wealth management firm faced stagnation in deposit growth and assets under management (AUM). Despite offering a comprehensive suite of financial products, the firm struggled to deeply understand client needs and behaviors, resulting in missed opportunities for personalized engagement, cross-selling, and long-term retention. Their existing systems lacked the analytical depth and agility required to adapt to evolving client expectations and market dynamics.

The Solution

To address these challenges, the firm partnered with O'Neil Digital Solutions and implemented the ONEsuite platform—a comprehensive Customer Communication Management (CCM) and Customer Experience (CX) solution. ONEsuite's advanced data analytics, AI-driven insights, and omnichannel communication capabilities enabled the firm to gain a 360° view of each client, facilitating personalized interactions and strategic decision-making.

The Results

By implementing ONEsuite, this prominent healthcare company achieved remarkable improvements:



Enhanced Client Insights

ONEsuite helped the firm better understand each client's preferences, goals, and behavior, **making it easier to personalize communication and build stronger relationships.**



Improved Retention Rates

Predictive analytics identified clients at risk of attrition, allowing the firm to proactively address concerns and tailor retention strategies, resulting in a **measurable increase in client loyalty.**



Increased Cross-Selling Opportunities

By analyzing client data, the firm identified opportunities to introduce relevant financial products and services, leading to a **notable uptick in cross-selling success rates.**



Growth in Deposits and AUM

The personalized engagement strategies facilitated by ONEsuite contributed to a **significant rise in new deposits and overall assets under management**, aligning with the firm's growth objectives.

Conclusion

The integration of ONEsuite transformed the firm's approach to client engagement, enabling data-driven strategies that fostered stronger relationships and drove business growth. With a unified platform for data analytics, communication management, and personalized outreach, the firm positioned itself as a forward-thinking leader in the wealth management industry.

Get In Touch

Discover how ONEsuite can revolutionize your client communications and drive growth in the financial sector.

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