

Time4Advice supercharges their marketing efforts using ClickDimensions native integration & Marketing Services

 **ClickDimensions**

Case Study

TIME4ADVICE

www.time4advice.co.uk

Time4Advice provides financial services software to the financial services industry, leading the way in financial planning and wealth management technology. With over 3,000 software users from over 100 firms, Time4Advice's end-to-end financial planning/wealth management CRM, client portal, advice, and back-office system was built using Microsoft technologies to create their leading software, CURO.

Key Outcomes

- A Marketing Automation tool which natively integrated with the Microsoft CRM
- Access to Marketing expertise from Marketing Services
- Ability to create and launch amazing campaigns that nurture customers and boost conversions
- Openness to new possibilities including more successful webinars and social posting
- Create a partnerships with ClickDimensions to recommend to their clients

Challenge

With the next generation of Time4Advice's software in the works, the team knew they had to begin looking for a Marketing Automation solution which could natively integrate into their existing Microsoft CRM to provide a seamless connection. With no previous solution, Time4Advice began working from the ground up, exploring potential solutions that integrated with Microsoft Dynamics 365 Sales. Having looked at many options, ClickDimensions came out the winner due to its breadth, native integration, interface and trigger workflow functionality, and most importantly – quick access to support expertise, which ultimately sealed the deal.

Solution

With many new technologies and tools to learn, Time4Advice utilized ClickDimensions Marketing Services team and began creating amazing campaigns and strategies, using the natively integrated CRM as their base. They leveraged a block of time for additional training and customization services to help build webinar automation triggers!

Quickly, Time4Advice's marketing team began implementing ClickDimensions key Marketing Automation tools such as email marketing and campaign automation to facilitate their marketing efforts, including a very successful webinar.

The team is continuing to leverage the functionalities needed to achieve their marketing goals such as profile management, web forms, email triggers, surveys and more, all of which improve Time4Advice's nurture campaigns success and expand their reach. They know they have immediate access to support when needed and can rely on the ClickDimensions Marketing Services team to assist in future project needs.

As the launch of Time4Advice's new technology gets closer each day, the marketing team will use ClickDimensions Marketing Automation solution to publicize, manage regulations and perform more marketing campaigns, aiding the overall success of their product launch.

Since working with ClickDimensions, Time4Advice has since become a ClickDimensions partner recommending and promoting our software to their clients..

"Click Dimensions has helped us gain valuable insights into the activity and behaviour of our clients and prospects. In addition, our marketing team can launch campaigns quickly and efficiently. It's simply a must-have for any firm looking to improve marketing and communication effectiveness"

- Roland Rawicz-Szczerbo, Director, Time4Advice