

# Customer Success Story




the  team

## Transforming Financial Advisory Services

How Icon partnered with  
First Technology to  
revolutionise efficiency  
and client engagement

# ICON

[www.first-technology.co.uk](http://www.first-technology.co.uk)



## Customer Challenge

Icon is a trailblazing digital service provider, empowering financial advisors with tailor-made software solutions. Designed to streamline processes, their platform equips advisors to engage, serve, and manage customers through a personalised, single interface.

The financial advisory industry has remained largely unchanged for decades, burdened by paper-based workflows and rising compliance requirements. Icon wanted to break free of these inefficiencies with an innovative, scalable solution that could minimise administrative burdens, optimise advisor-client interactions, and consolidate operations into a unified system.

## The Solution

### Flexible, Scalable CRM Implementation

Microsoft Dynamics 365 was chosen for its integration with Office 365 and Azure.

### Powerful Features for Advisory Efficiency

The system enabled lead logging, case management, and a unified view of advisors, practices and client data.

### Built to Grow and Adapt

Its scalable, white-label-ready architecture supports diverse use cases.

**"We enjoyed the flexibility and 'anything is possible' attitude... this really spoke to a partnership we wanted to be involved in."**

Sean Kelly, Digital Platform  
Managed at Icon

## The Results

### Enhanced Client Engagement

End-to-end reporting and intelligent data consolidation improved client interactions and engagement.

### Standardised Processes and Insights

Scalable, streamlined workflows provided actionable insights, ensuring consistent and efficient operations.

### Cost Savings and Industry Differentiation

Automation reduced internal workloads and administrative friction, driving cost savings and positioning Icon as a market innovator.