

Transforming financial advisory services

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

ICON

**CUSTOMER
SUCCESS STORY**



Customer challenge

Icon is a digital service provider dedicated to empowering financial advisors with tailored software solutions. Its platform enables advisors to manage customer relationships through a personalised, single interface, streamlining operations and improving client engagement.

Determined to disrupt an outdated industry, Icon's mission is to democratise access to financial advice, delivering value to clients while enabling financial freedom. However, the financial advisory sector remains burdened by paper-based processes, increasing compliance demands, and fragmented workflows.

The solution

After an extensive platform search, Microsoft Dynamics 365 emerged as the ideal choice for its flexibility, scalability, and seamless integration with Office 365 and Azure.

The CRM Team from First Technology Group worked closely with Icon to design and implement a tailored Dynamics 365 solution that included:

- A consolidated view of advisors, practices, and clients.
- Lead-logging, sales pipeline tracking, and contact-type differentiation.
- Case management for document uploads, quote generation, and query resolution.
- A scalable architecture with white-labelling options to adapt for multiple use cases.

This modernised environment transformed advisor-client interactions, improved efficiency, and delivered valuable insights for business growth.

"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 Manager at Icon

The results

- **Enhanced client engagement:** End-to-end reporting and intelligent data consolidation.
- **Standardised processes:** Streamlined workflows with actionable insights.
- **Improved efficiency:** Automation reduced administrative workloads and friction.
- **Cost savings:** Efficiency gains improved profitability and value proposition.
- **Market differentiation:** Established Icon as a digital innovator in financial advisory services.