



## ENHANCING SALESFORCE PLATFORM FOR A WEALTH MANAGEMENT COMPANY

### Challenge

- Lack of a system to track and manage leads.
- Several processes rely on manual data entry leading to data inconsistency.
- Manual data entry of property stock list, availability and construction progress, with no visibility to other departments/ teams.
- Need for a system to solve reporting issues.
- Siloed data systems need integration with Salesforce.

### Our Solution

- Implemented Salesforce to provide a single homogeneous platform to store and process all customer and service data consistently and avoid duplication.
- Managed client's service life cycle using standard and custom objects.
- Customized Salesforce to set workflow rules for sending out appointment reminders to client managers.
- Created custom reports and dashboards to view appointments and provide insights about key performance measures.
- Integrated Salesforce with other apps like Outlook, Conga Composer, Active Campaign and Xero.
- Set up Chatter for communication between teams, sharing files, data and connecting various departments.

### Business Benefits

- Client got a unified platform to track and view the entire life cycle of its clients.
- Workflows, Email templates, Reports & Dashboard reduced manual work and human errors thus resulting in saving time and resources.
- Reports about property construction and appointments improved tracking and management.
- Use of Chatter for communication across departments increased company growth and efficiency.

### Client Description

- A trusted wealth management company providing services like wealth management, financial planning, home loans, retirement planning and tax saving.
- Provide financial advice related to investments, property rentals, refinancing etc.

## About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. We have years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Lightning platform development.

We assess your needs to provide maximum value through IT to increase your impact and achieve your mission.



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