

Your Trusted Guide to Salesforce Success in Wealth Management - Advice

Empower. Innovate. Transform.

IntellectAI is your one-stop shop for a seamless Salesforce implementation journey within the Wealth Management industry. We are a team of passionate AI and Salesforce experts, dedicated to helping you navigate the complexities of digital transformation and achieve unprecedented success.

Background

Our client, a FTSE 100 company, offers wealth management and financial planning solutions to its clients with the help of expert financial advisers.

Intellect AI embarked on a large digital transformation journey to transition both internal business functions and their partnership of financial advisers onto the Salesforce platform with the goal to recognise process improvements that lead to efficiencies and bring business value from day one.

The solution provides an enhanced partner experience through Salesforce Core CRM, Financial Services Cloud and Custom Application Development on the Salesforce platform for managing and servicing client investors.

Challenges



Inconsistent user experience:

Diverse legacy systems and processes resulted in an inconsistent user experience.



Multiple Application Access:

Data was distributed across multiple systems needing advisors to access multiple applications to complete routine tasks.



Operational Inefficiency:

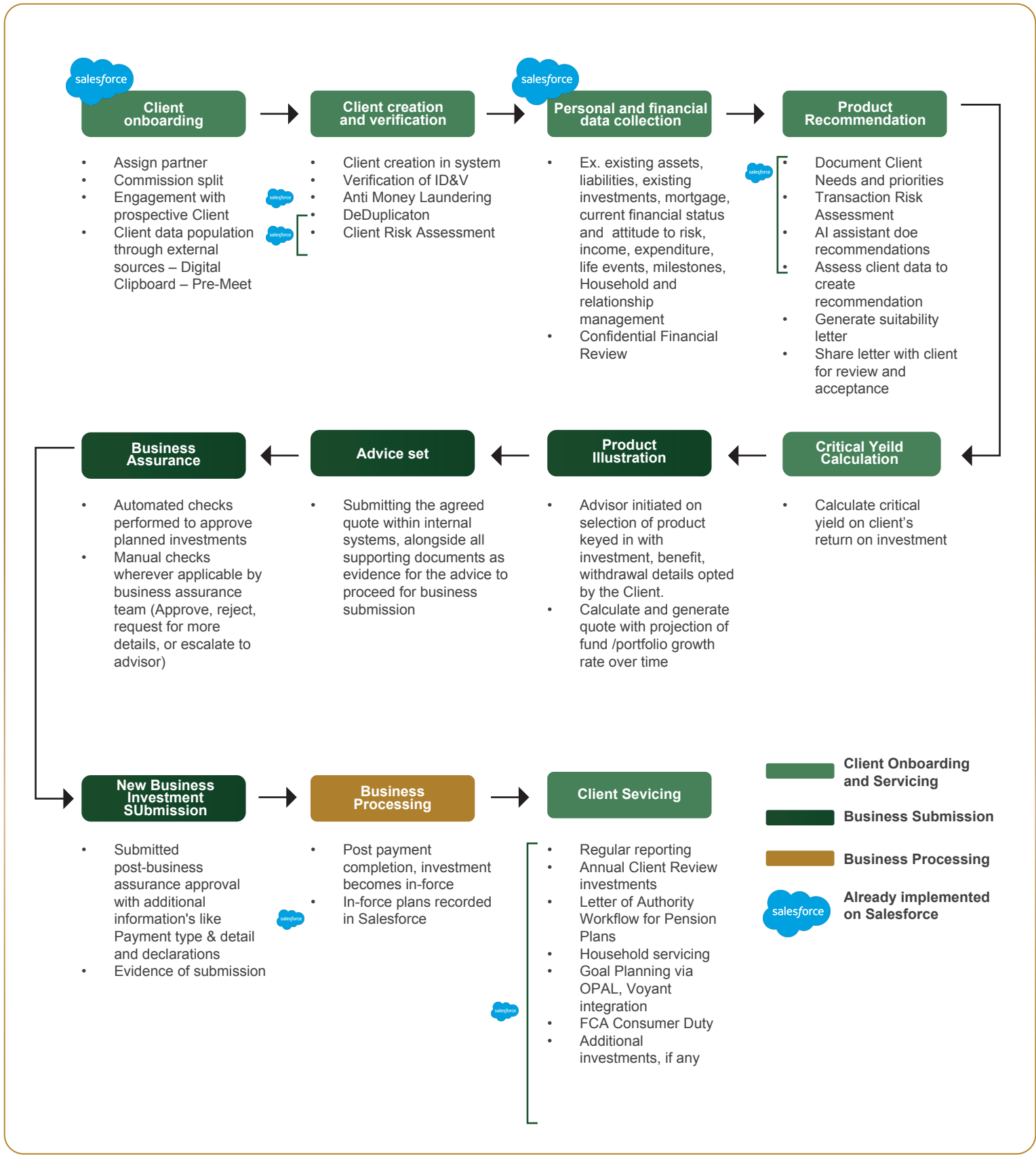
High operational overheads due to the siloed landscape.










Data Quality

Inconsistent data quality including duplication and incomplete data artefacts.

IntellectAI's Solution



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Leveraging Salesforce: Built on Financial Services Cloud, Experience Cloud and Marketing Cloud. Utilising out of the box components wherever possible.
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Custom Build: Where out of the box solutions would not suffice, built custom Apex components that aligned with expected business needs.
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Seamless Data Integration: Mulesoft integration platform ensures rich data visualization. Integrating with backend data through Snowflake and Talend.
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Sharing and Accessibility: Custom designed and implemented a sharing model to facilitate secure access to the business and its 3000 + partner advice companies.
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Omni Studio: Enhanced the client experience through the use of Omni Studio and its pre-built components.
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App Integration: Integrated Applications available on the Salesforce App Exchange where pre-built Applications met the business requirement and helped accelerate time to market.
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Best-in-Class DevOps: Utilised industry-leading tools and implemented secure processes for continuous integration and delivery.



Key Rollout Metrics		
Users	Features/User Stories	Geographies
<p>14,000+ users, across the business and</p> <p>3,000+ partner advice practices</p>	<p>500+</p>	<p>5 Countries (UK, Ireland, Singapore, China, UAE)</p>

Key Outcomes

- » One stop solution providing real time 360-degree financial view of the customer.
 - » 100% digitization, eliminating paperwork wherever possible.
 - » Highest level of engagement with customers through email, notifications, and chat.
 - » Seamless connectivity via mobile devices
 - » Single sign-on capability.
 - » Improved customer relationship achieved during global pandemic.
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Awards

UK IT
INDUSTRY
AWARDS

Financial Services Project of the
Year - 2023

FS*tech*
awards 2023

IntellectAI recognised as the
'Best Financial Services IT Team'

Contact us today and embark on your digital transformation journey with confidence!

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