



End-to-end Sales Enablement with SFDC for a Wealth Management Firm in US

Key Challenges



- Data Disparity: Tracking advisor performance across multiple platforms hindered accurate assessment
- Manual Bottlenecks: Time-consuming manual processes limited productivity and insights
- Limited Visibility: Lack of real-time data impeded strategic decision-making

Business Solution



- > Data Consolidation: Centralized advisor Data on Salesforce for comprehensive visibility
- > Process Automation: Streamlined workflows and reduced manual effort through automation
- > Advanced Analytics: Leveraged Einstein Analytics for actionable insights and performance optimization

Business Impact



Up to **35%** Increased in Asset Utilization

Improved tracking reporting

Stronger advisor engagement

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