



Case Study

Digitized Core to Enable
Expansion & Future Innovations
for **Canadian Online Wealth
Management Firm**



Client

The client is an online brokerage and wealth management firm, based in Canada.



Challenges

- ✓ Fostering synergies by migrating the organizational data & processes from the acquired entity over to the acquiring parent Salesforce organization.
- ✓ Maximizing value of Salesforce investment, while decreasing TCO by creating a shared environment and leveraging the existing Salesforce modules.
- ✓ Accelerating time-to-value by deploying must-have features before code freeze, and subsequently evolving the good-to-have functionalities.



LTIMindtree Solution

- ✓ Merged the data and processes into a single Salesforce-based organization and refined the data model.
- ✓ Refined cross-organizational taxonomies and overlapping functionalities as per client standards.
- ✓ Conducted thorough analysis and executed tech debt reduction of the Salesforce organization, thereby bringing technical efficiencies.



Business Benefits

- ✓ Created a shared environment & foundation for future innovation.
- ✓ Enhanced the business platform to further enable cross-sell of offerings.
- ✓ Elevated customer share of wallet across the parent organization's business lines.

LTIMindtree is a global technology consulting and digital solutions company that enables enterprises across industries to reimagine business models, accelerate innovation, and maximize growth by harnessing digital technologies. As a digital transformation partner to more than 700 clients, LTIMindtree brings extensive domain and technology expertise to help drive superior competitive differentiation, customer experiences, and business outcomes in a converging world. Powered by 84,000+ talented and entrepreneurial professionals across more than 30 countries, LTIMindtree – a Larsen & Toubro Group company – combines the industry-acclaimed strengths of erstwhile Larsen and Toubro Infotech and Mindtree in solving the most complex business challenges and delivering transformation at scale. For more information, please visit <https://www.ltimindtree.com/>