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.