CUSTOMER SUCCESS STORY

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Destination Wealth Management

Overview

Destination Wealth Management was established in 1986 with the sole focus of providing their clients the necessary resource of establishing and hitting their financial goals. Destination Wealth has over 4,000+ clients throughout the United States. They have over $2.7B in assets under management and pride themselves on their client relationships.

Goals

- Migrate from Sales Cloud to Financial Services Cloud
- Bring Financial Account Data into Salesforce through Orion Advisor Services integration
- Deploy Household Data Model for Wealth Clients
- Advisors manage Client relationship, businesses & centers of influence in one system
- Manage Financial Accounts & Goals
- Automate Referral & Lead tracking management
- Keep pace with changing technology by building digital capabilities and transforming their organization
- Easy access to upgrading client touch points and overhauling their value propositions

Solutions & Key Integrations

Migrate & Deploy Financial Services Cloud

Orion Advisor Services Integration

Automated Referral and Lead System

Results

Financial Services Cloud Offers:

- Unified Profiles - Organization and Household Consolidation model
- Life Events Tracking i.e. Marriage, Birth of child, Home purchase, retirement planning
- Easy ability to Merge and Split Households (including Members, Groups, Object-Roll ups)
- Wealth managers will enhance efficiency through front-to-back automation with leaner processes
- Delivered innovative business-to-business solutions
- Created a platform to identify potential issues with personal portfolios, offering tailored remedies to bring the health status back to desired levels