

VASS Accelerators

ESG: Transforming Financial Services

ESG ensures that shareholder value is maximised while adhering to the improvement of the environment and society in general.

Our Credentials & Cloud Experience

Lightning	App	Sales	Service
Financial Services	Marketing	Shield	Communities
Integration	Heroku	Commerce	Productivity

Our Experience & Expertise

185+ Consultants	440+ Certifications	15 FSC Implementations
3 Salesforce Awards	15 Accelerators	★★★★★ Customer Rating

What is it?

- Environmental, Social and Governance (ESG) metrics measuring sustainability and positive impact of an investment or business for long term value creation
- Collect, Monitor, Manage & Report on ESG Strategy
- 360° Dynamic Real Holding View
- Workflow Optimisation (Data validation, Search Parameters)
- Inbound & Outbound Integration (e.g. Bloomberg)

Customer Success Story

Challenge

- Lack of a 360° view of investment companies
- Poor ESG management and reporting
- Functionally limited on-premise system
- Existing solution was not aligned their SaaS IT Strategy

Solution

- Salesforce Platform replacing on-premise system
- Automation of the importing, exporting and transforming of data
- Improved collaboration and data interaction
- Integrate with 3rd-party platforms

Results

- Fit-for-purpose Platform
- Expedite investment decision-making with improved reporting and visualisation
- Active ownership of investments
- Ability to automate, interact and analyse data seamlessly within their platform.
- Overall reduction on team workload and improvements in data reliability

Who is it for?

- Corporate & Investments Banks
- Commercial Banks
- Wealth & Asset Management Firms
- Private Banks
- Retail Banks

Why is it important?

- Increased oversight by policy makers
- External ESG ratings and benchmarks
- Global Reporting Initiative (GRI) Index
- Investor, Business, Government pressure for sustainability
- 360° Dynamic Real Holding View
- ESG Investment Doubled in 2020
- Availability of Actionable Data
- Data-driven insights for sustainability
- ESG investments doubled over four years, to \$40.5 trillion in 2020

Other VASS Salesforce References

Core Team



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