

Developed Goal Planning & Investment Risk Simulations on force.com



The Background

The client is a small Wealth Management firm that uses Salesforce. It decided to implement basic risk assessment and goal planning function on Salesforce.

The Challenge

Salesforce does not have any risk assessment and goal planning functions or AppExchange applications.

Our Solution

Organized working sessions to flesh out requirements and mathematical models for capturing the investment risk profile attributes, computing investment risk profile and running Monte Carlo simulation for goal planning. Built the custom functionality for risk profiling and goal planning using visual force and force.com.

The Results

- Now the advisors are able to do their client investment risk profile assessments on Salesforce which improves the experience for both client and advisors and also streamlines the client data capturing process.
- Advisors don't need to use different systems for goal planning. This saves time. The end clients can get access to the goal information through Salesforce community site.

About Mirketa Inc

We are a bay area company with our global delivery center located in Noida India. We have completed over 300 engagements with startups and fortune 500 companies to build solutions for Sales, Marketing, Human Resources and Customer Service areas using salesforce.com ecosystem and other web technologies.

We provide strategy, analysis, UI design and development services needed to convert concepts into great products

We use our offshore delivery center to scale our teams and provide cost and time to market advantage to our clients.

While the business problems that we solve are complex, we make working with us simple & fun. We have less than 10% employee attrition rate and over 80% of business comes from repeat customers.

[Want to know how we can help?](#)

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