



CLIENT PROFILE

Exencial

Wealth Advisors™

We deliver financial advice and execution to clients across the U.S. from customized portfolios to tax and accounting.

INDUSTRY

Financial Services

PRODUCTS

AppBuilder, Platform; Process Automation, Security, Privacy, and Service Cloud

SERVICES

FSC Analysis & Design



Caleb Stinson, Director of Operations



www.exencialwealth.com

WHAT THEY NEEDED

Exencial had several processes, all using the case object to track progress. Inefficiencies were identified due to excessive back-and-forth communication, insufficient visibility into the progress of individuals in various roles, and ease-of-use issues that obstructed accurate data capture.

HOW WE SOLVD IT

SOLVD examined the client's existing processes and devised a new solution utilizing Omni Studio, an automation tool available within Financial Services Cloud. The new approach streamlines the workflow and grants enhanced visibility into the progress of each step and the various roles involved in the process. To ensure a seamless transition, SOLVD documented the solution and provided the client with a comprehensive project plan and estimate for their reference and planning purposes.

WHAT THEY SAID

"We've had the pleasure of working with SOLVD, a consulting partner with deep expertise in Salesforce and industry-specific knowledge. They helped us rework our case architecture, resulting in a much more efficient architecture. They are open to newer technology something I haven't found with other vendors. I will be using their services again." - Caleb Stinson

