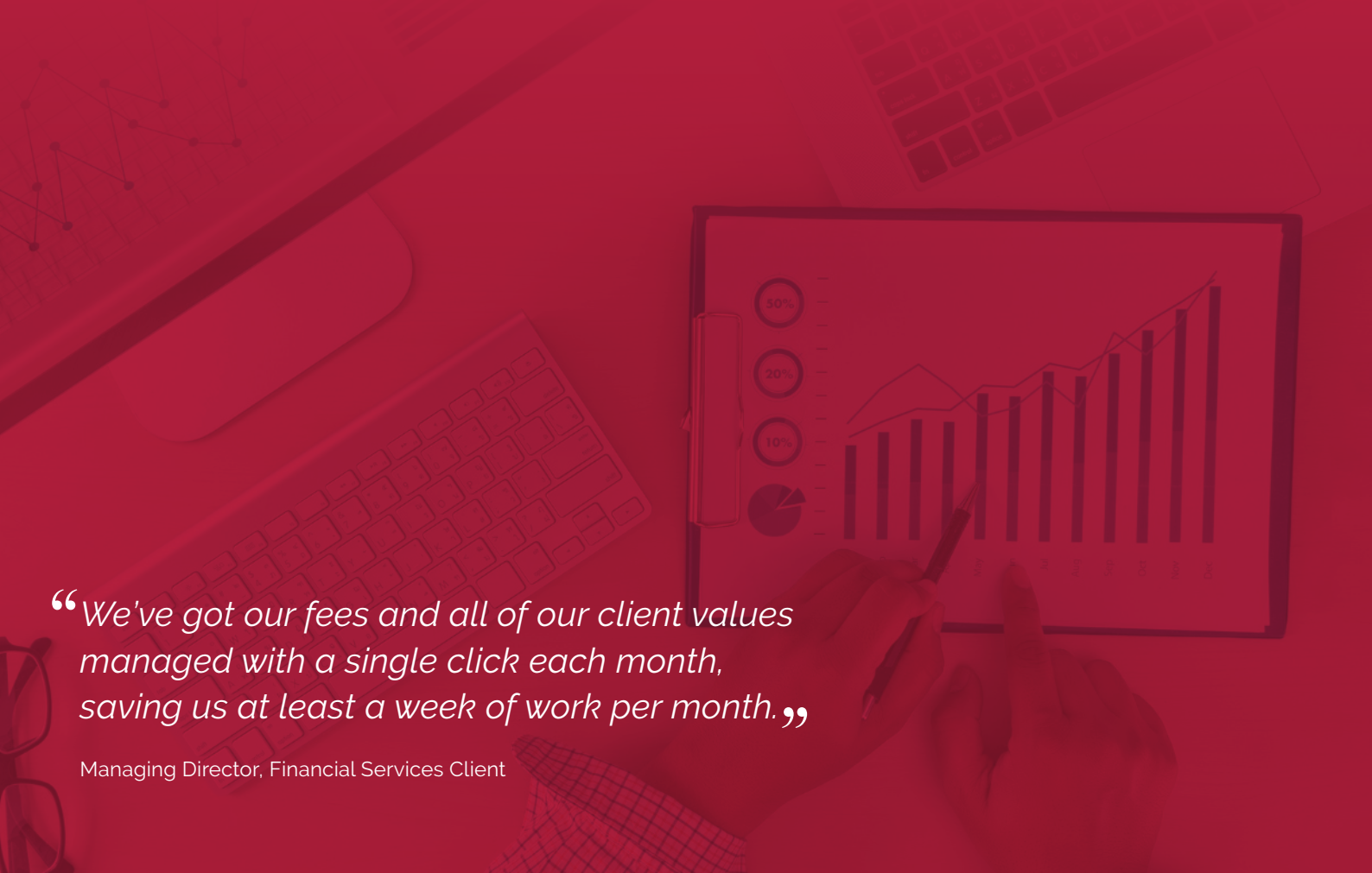


CUSTOMER SUCCESS STORY



How **New Era Cloud's** bespoke approach to developing and implementing a Salesforce hybrid Platform and Sales Cloud solution enabled a financial services company to become significantly more efficient and effective at managing their detailed investment fund transactional, return and payout data and scale to their biggest number of clients yet.



“We've got our fees and all of our client values managed with a single click each month, saving us at least a week of work per month.”

Managing Director, Financial Services Client

Project overview

The client is a financial services company providing investment products to financial advisors and private investors around the world. They are involved in financial industry product distribution and are committed to providing access to the most unique and forward-thinking investment solutions.

Prior to **New Era Cloud** being engaged, the company experienced challenges in finding a partner who could understand the intricacies and detailed industry technical processing requirements. After an initial project was attempted, the client turned to **Salesforce** to recommend an alternative partner. **New Era Cloud** spent the time necessary to fully understand and absorb the explicit needs of the client which led to the provision of a detailed scope of the desired solution and the delivery of a truly successful outcome.

Our approach

In their search for a consultant to support them with developing a highly tailored **Salesforce** solution and implementing a bespoke data management and processing solution, the client experienced several challenges:

CHALLENGE 1:

Finding a partner that would **design a solution** that would be **highly accurate** and in line with their **very specific scope of work and timeframes**.

CHALLENGE 2:

Finding a partner that could show them how to **maximise the functionality and capabilities of Salesforce** to save them time.

CHALLENGE 3:

Finding a partner that would **hold them accountable** and ensure they discovered the best possible solution to **manage and organise large amounts of data**.

This has resulted in greater efficiencies, which are ultimately enabling them to continue on their steep growth trajectory as outlined by their CEO. The solution they have implemented has not only substantially **improved the bottom line** and **maximised their return on investment** but has also **reduced stress and anxiety** around making manual errors when processing large amounts of financial data.

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Their team explain how New Era Cloud has enabled them to implement an extensive, accurate and time-saving solution...

Before we engaged New Era Cloud, it would take us at least a week per month to manually calculate what we can now calculate by clicking a few buttons. We just put a number in for the end of the month valuation, which then filters down to all the investments automatically.

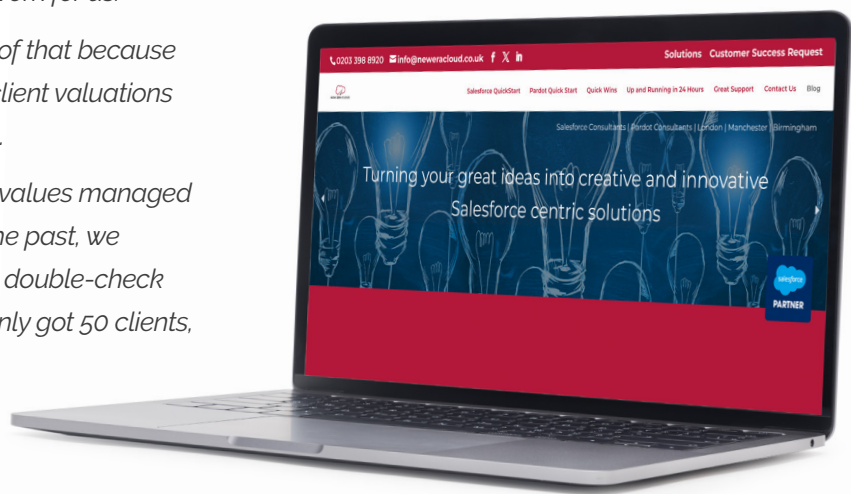
*As an essential additional benefit, the solution also includes our complex management fee calculations that we charge each month and moves that into our own internal fee account. **I think it's amazing** how we've managed to get the system to a point where it does that automatically, and it means a lot less work for us.*

Our CEO is certainly feeling the benefit of that because he had to do a lot of manual work for client valuations before we had the new system in place.

We've got our fees and all of our client values managed with a single click once per month. In the past, we would have to manually calculate and double-check everything each month. When you've only got 50 clients,

that's fine, but when you're growing and growing, it's almost impossible. So having one piece of data affect all of our underlying accounts, including our fees getting managed for us in the background has probably saved us at least a week of work per month.

Managing Director, Financial Services Client



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Our solution

KEY PRODUCTS



- ✓ Sales Cloud
- ✓ Platform



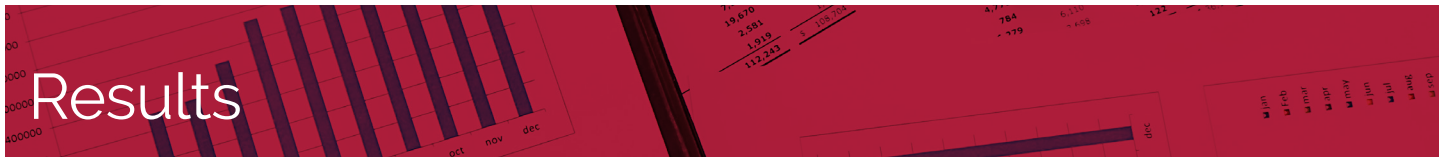
NEW ERA CLOUD

- ✓ Development
- ✓ Solutions Assurance

BUSINESS SOLUTION

Elements of the solution:

- ✓ Customer Relationship Management (CRM)
- ✓ Apex and Visualforce Development
- ✓ Process Automation
- ✓ Management Reporting and Dashboards
- ✓ Office 365 Integrations



Results

With the support of our consultant, Nigel Fisher and the **New Era Cloud** team, the client's whole team now has a solution that enables them to manage customer and financial data efficiently and with high levels of accuracy. **New Era Cloud** has provided a bespoke data management solution, which saves the business significant time each month and has been instrumental in facilitating their fast growth.

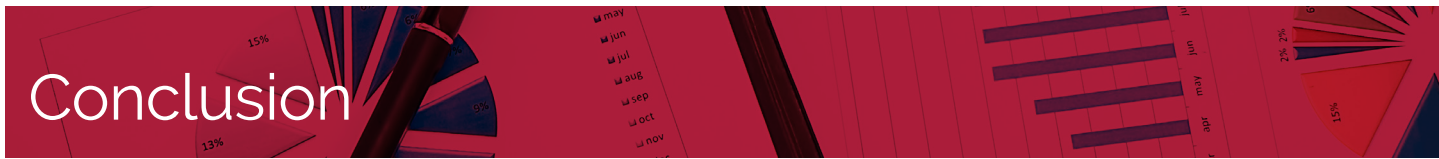
A key part of the project involved making sure that all aspects of financial management and scenario planning for their client had been considered. The solution designed and implemented by New Era Cloud has fundamentally advanced capabilities to cope with the day-to-day complexities dealt with by the client.

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I was on the fence at first about whether we needed this kind of solution. But it has, without a doubt made our lives so much easier. The biggest thing for me was that the functionality included not only client information, but also the codes, fees and valuations. A lot of hard work went into it and it is working perfectly.

Managing Director,
Financial Services Client

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Conclusion

The **New Era Cloud** team have helped their **financial services client** to discover the full potential of designing a bespoke solution using Salesforce Sales Cloud and Platform to **support not only their own internal operations, but also to provide an improved service for their clients.**

They have taken the stress and anxiety away from the client team, who were previously managing every aspect of their client data on spreadsheets and were conducting manual financial calculations that could be prone to human error.

Following implementation of their new solution, they estimate they have saved in excess of one week of time per month (over 25%), enabling them to take their business to the next level of growth by increasing their capacity to support more clients.

About New Era Cloud

Created in 2009, New Era Cloud is one of the longest established Salesforce partners in the UK with a history of over 30 years in business management consulting, business process improvement, cloud transformation and innovation. We provide dynamic and trustworthy advice, knowledge and expertise with a range of different consulting styles to complement your organisation's personality and aspirations.

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