



Transforming Financial Services Operations with a Unified CRM Solution

Streamlining Data, Modernizing Processes, and Securing Operations



EXECUTIVE SUMMARY

A leading financial services firm faced challenges with outdated systems and inconsistent data management. Blue5Green stepped in with a complete Salesforce migration and modernization solution.

By merging legacy tools into a single Salesforce platform—including Sales Cloud, Service Cloud, Marketing Cloud, and Experience Cloud—the firm achieved faster processes, improved data accuracy, and stronger security. Key outcomes included streamlined data workflows and a user-friendly interface.



CLIENT BACKGROUND

The client is a leading financial services firm that offers quantitative equity and multi-asset solutions.

With a focus on custom systematic methods to address market challenges, the firm needed to keep its operations secure and efficient. They operate on a large scale and are known for combining expert market insights with advanced technology.



THE CHALLENGES

Before the new system, the client struggled with multiple outdated platforms, such as ICE/PIVOTAL CRM and LotusNotes. These systems led to poor data management and slow processes that affected daily operations. The outdated tools also made it harder to meet modern security standards and quickly update customer records. For example, manual data entry and fragmented record keeping reduced efficiency and sometimes delayed critical business decisions.



THE SOLUTION

Blue5Green provided a complete Salesforce build and migration solution that addressed these issues head on. The work included:

- **CRM Migration & Dynamic Utilities:** Legacy systems were migrated into Salesforce, eliminating the need for manual data entry. Dynamic forms were built to allow easy data input, and related lists were designed to improve visibility across records. A connection with the Oracle database ensured that data remained up to date, with seamless synchronization across systems.
- **Salesforce Lightning Migration:** Outdated Visualforce components were converted to Lightning Web Components (LWC). This update resulted in a modern interface with improved page layouts and faster response times. Automated redirection for action buttons simplified user tasks and reduced the training time needed for new users.
- **Integrations & Security Enhancements:** Blue5Green integrated external tools such as Twilio for automated contact updates and text notifications, helping to keep customer information current. Security was enhanced with the integration of ForcePoint reverse proxy and strict phone validation measures, ensuring compliance with industry standards and audit requirements.





RESULTS & BENEFITS

The project delivered significant improvements:

Increased Efficiency:

Automated data management and streamlined processes cut processing times, reducing manual work and speeding up daily operations.

Improved Data Accuracy:

The Oracle database sync and dynamic forms reduced data entry errors, resulting in more reliable and up-to-date information for decision-making.

Enhanced User Experience:

The transition to Lightning Web Components created an intuitive interface that lowered the learning curve for staff, leading to faster adoption and higher satisfaction.

Strengthened Security:

Enhanced integrations and updated security protocols met compliance standards, ensuring that sensitive data remained protected.

CONCLUSION

By unifying multiple legacy systems into one powerful Salesforce platform, the client improved efficiency, data accuracy, and security. This transformation demonstrates how expert guidance and a clear plan can update even the most challenging systems.

Organizations seeking to improve their operations and secure their data are encouraged to reach out to Blue5Green to explore how Salesforce solutions can support their business goals.

