CLIENT SUCCESS STORY

Multi-Acquisition RIA

Scaling a PE-Backed RIA from $1B to $14B+ AUM with a Unified, Declarative Salesforce Architecture

340%	$2.27M	30%	25%
Verified ROI in 18 Months	Advisor Productivity Gains	Faster Client Onboarding	Increase in Client Retention

THE CHALLENGE

The client is a prominent independent, fee-only wealth management firm that scaled from $1 billion to over $14 billion in AUM through aggressive organic growth and an M&A strategy fueled by a strategic recapitalization from a leading private equity sponsor. Between 2018 and 2026, the firm acquired 17+ independent advisory firms—integrating one new entity nearly every month at peak velocity—each bringing its own legacy CRM, data taxonomies, and operational workflows.

The firm's existing Salesforce Classic environment was crippled by broken Batch Apex code from prior third-party implementations, an aging Salesforce-for-Outlook integration nearing retirement, and fragmented data silos across acquired offices running Junxure, Ebix SmartOffice, and other legacy platforms. With an industry CRM failure rate of 47–70%, leadership recognized that sustaining PE-backed hyper-growth demanded a complete architectural overhaul—not another software installation.

THE VANTAGE POINT SOLUTION

Operating under a Master Services Agreement established in 2020, Vantage Point delivered a continuous, multi-year transformation anchored in a People-Process-Technology framework—ensuring every configuration mapped to a measurable business objective. The engagement spanned five major workstreams:

Lightning Migration & Technical Debt Elimination Dismantled broken Batch Apex code and rebuilt all core business logic using declarative Salesforce Flows, restoring critical overnight automations and dramatically reducing total cost of ownership. Migrated the entire enterprise from Classic to Lightning with custom-tailored record pages, comprehensive UAT, and a bifurcated training program targeting power users and the broader advisor base. Deployed Einstein Activity Capture to future-proof email and calendar synchronization.

Post-Merger Data Governance at Scale Engineered repeatable, six-phase M&A data migration protocols (Discover, Migrate, Test, Deploy, Communicate, Support) using Alteryx for complex relationship mapping. Executed migrations from Junxure and Ebix SmartOffice into Salesforce with sandbox-first validation and dedicated post-deployment triage. Secured
Full Copy Sandbox and Salesforce Unlimited Edition to support enterprise-grade testing at acquisition velocity.

MoneyGuidePro SSO & Ecosystem Integration Built frictionless Single Sign-On from Salesforce Household records directly into MoneyGuidePro with intelligent logic handling three scenarios: new account linking, relationship evolution, and automated provisioning. Deployed Dataloader.io as middleware for scheduled JSON ingestion from FTP, Box, and Dropbox—eliminating manual dual-entry and delivering a true 360-degree client view.

Advisor Workflow & Mobile Optimization Deployed FormTitan-powered meeting workflows with automated 60-minute pre-meeting briefings, pipeline auto-progression on initial consultations, and a strict 15-minute no-show validation window enforcing real-time data hygiene. Optimized the Salesforce mobile experience for iPad-based advisors and standardized onboarding committee approval flows for seamless execution from any location.

Enterprise Survey Ecosystem & CRM Analytics Deployed a lifecycle-triggered survey architecture via GetFeedback—covering onboarding, M&A integration, annual satisfaction, and attrition—with industry-standard NPS calculations and context-aware branching logic tailored per acquired firm. Built CRM Analytics conversion reports tracking funnel velocity and advisor performance, plus digitized annual tax questionnaires with bidirectional Salesforce write-back.

MEASURABLE BUSINESS IMPACT

METRIC	BEFORE	AFTER VP DEPLOYMENT
Return on Investment	Undefined technology ROI	**340% ROI in first 18 months**
Advisor Productivity	Manual entry across silos	**$2.27M in productivity gains**
Admin Time Savings	Advisors buried in data entry	**8–12 hours/week reclaimed per advisor**
Client Onboarding	Manual, multi-week process	**30% faster onboarding cycle**
Client Retention	Reactive, anecdotal tracking	**25% increase via proactive workflows**

TECHNOLOGY STACK

- Salesforce Financial Services Cloud
- Salesforce Flows (Declarative)
- Einstein Activity Capture
- MoneyGuidePro SSO Integration
- CRM Analytics (CRMA)
- FormTitan (Workflow & Tax Forms)
- GetFeedback (Survey Ecosystem)
- Alteryx (M&A Data Migration)
- Dataloader.io (Middleware)
- Full Copy Sandbox (Enterprise QA)

CLIENT TESTIMONY

"Vantage Point didn't just implement software—they engineered a scalable architecture that let us integrate 17 acquisitions without breaking stride. The system pays for itself every quarter in advisor time reclaimed."

— Operations Leadership

WHY VANTAGE POINT

Vantage Point is a Salesforce Consulting Partner focused exclusively on financial services. Our 100% senior-level, US-based delivery team brings 150+ years of combined industry experience across wealth management, banking, insurance, fintech, and mortgage lending. With 400+ engagements, 150+ clients, a 95% retention rate, and a 4.71/5.0 satisfaction score, we deliver measurable results—not just implementations.

Ready to scale your wealth management technology?

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