VANTAGE POINT

Your Trusted Salesforce Partner

CLIENT SUCCESS STORY

$90B National RIA

Unifying a $90B Wealth Management Enterprise on Salesforce Financial Services Cloud

$90B+	100+	1,400+	85–95%
Assets Under Management	Office Locations	Employees Nationwide	User Adoption Within 90 Days

THE CHALLENGE

The client is a national fiduciary RIA backed by leading private equity sponsors. Through aggressive acquisitions, the firm scaled from $5.7 billion to over $90 billion in AUM—but rapid growth created severe M&A technology debt. Dozens of inherited CRM platforms, disconnected scheduling tools (Calendly, Acuity, Microsoft Dynamics), and fragmented data silos persisted across every acquired firm.

When the firm moved to integrate an external call center team to scale lead qualification, the limitations became untenable. External schedulers needed real-time access to advisor calendars—but granting full Salesforce CRM licenses would have been cost-prohibitive and a serious data governance risk, exposing sensitive client PII, portfolio allocations, and estate plans.

THE VANTAGE POINT SOLUTION

The firm's Chief Technology & Data Officer—a 25-year financial services technology veteran—retained Vantage Point to architect a unified enterprise scheduling engine. Using our proprietary VALUE Methodology, we delivered three interconnected workstreams under an aggressive go-live deadline:

Secure Experience Cloud "Airlock" Rather than provisioning costly CRM licenses, we built a branded Experience Cloud portal as a secure bridge between external schedulers and Salesforce FSC. Third-party agents could view real-time advisor availability and book consultations—without ever accessing client data, portfolio allocations, or PII.

Bidirectional Calendar Synchronization Deep integrations via Lightning Sync and Einstein Activity Capture established real-time bidirectional sync between Salesforce Lightning Scheduler and each advisor's Outlook/Exchange calendar. Advisors never learned a new system—their existing Outlook calendars drove the scheduling engine automatically. Custom logic resolved cross-timezone discrepancies and prevented conflicting multi-advisor bookings.

Automated Communication Workflows Salesforce Flows triggered instant confirmation emails with dynamically populated Microsoft Teams links, RingCentral dial-in credentials, or physical office directions based on each advisor's profile. Automated reminder cadences reduced no-show rates. One-click "suggested times" booking links eliminated multi-touch email negotiations entirely.

TAILORED DEPLOYMENTS ACROSS DIVISIONS

Tax Planning Division: Migrated from an aging Microsoft Dynamics scheduling system to a specialized Lightning Scheduler branch with rollover events for annual recurring appointments, granular calendar preferences by month/day/hour, and automated 7/5/2-day reminder sequences tuned for peak tax season.

Inside Sales (High-Velocity Sales): A targeted 43-day deployment implemented Salesforce HVS to transform a team processing up to 4,000 leads per day. Automated outbound scheduling templates replaced manual data entry and copy-paste SMS workflows, freeing representatives to focus exclusively on high-value conversations with pre-qualified,

MEASURABLE BUSINESS IMPACT

METRIC	BEFORE	AFTER VP DEPLOYMENT
System Architecture	~30% industry baseline	**85–95% within 90 days**
Admin Task Reduction	Manual emails & data entry	**27% reduction (8–12 hrs/wk saved)**
Data Completeness	Fragmented across shadow IT	**350% improvement in CRM data**
Meeting Booking Rate	High-friction, multi-touch	**40–80% improvement**
Compliance Audit Prep	Manual record reconciliation	**40% reduction in prep time**

TECHNOLOGY STACK

- Salesforce Financial Services Cloud
- Salesforce Lightning Scheduler
- Salesforce Experience Cloud
- Salesforce High-Velocity Sales
- Einstein Activity Capture
- Salesforce Inbox
- Microsoft Exchange / Outlook Sync
- Salesforce Flows & Process Builder

CLIENT TESTIMONY

"Vantage Point is the only Salesforce consulting team who has actually delivered on their contract...above and beyond expectation. Fast, skilled, and knowledgeable across all of Salesforce."

— Executive 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 modernize your wealth management technology?

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