CLIENT SUCCESS STORY

$30B+ Independent RIA

Deprecating Years of Technical Debt with a Clean-Slate Salesforce Financial Services Cloud Reimplementation for a $30B+ National RIA

95%	350%	27%	14
System Adoption in 90 Days	Data Completeness Improvement	Admin Task Time Reduction	Enterprise Integrations

THE CHALLENGE

The client is a nationally recognized independent registered investment adviser managing over $30 billion in regulatory assets. With multiple regional teams spanning Private Client Services, Wealth Management, Central Operations, and Trading, the firm had scaled rapidly through organic growth and acquisitions.

The firm was entirely dependent on a legacy Salesforce environment that had become a critical bottleneck. Years of expedient customizations created a system running at 123% of data storage capacity (19.1 GB), burdened with 2,854 Apex classes, 113 triggers, 1,007 Lightning components, and 194 fragmented Flows. Advisors were forced into fragmented "swivel chair" workflows across disconnected systems—toggling between Salesforce, Addepar, LaserFiche, SharePoint, and RingCentral just to assemble a complete client picture. Commission calculations, trade requests, and option orders lived in isolated custom objects, preventing any unified view of client servicing. Leadership had no closed-loop reporting, and carried severe compliance risk from fragmented record-keeping.

THE VANTAGE POINT SOLUTION

Vantage Point architected and delivered a phased, enterprise-scale Salesforce Financial Services Cloud transformation to completely deprecate the legacy environment and establish FSC as the firm's singular, authoritative engagement layer. Working closely with the client's leadership, we delivered across three major deployment phases using a disciplined agile methodology with 1,276 approved project hours over approximately 27 weeks:

Critical Foundations & Omnichannel Integration Deployed customized FSC with Person Account relationship mapping, replacing legacy custom code across complex household and trust structures. Executed Orion Connect and DocuSign integrations, advisor dashboards, commission calculations, and Calendly scheduling. Migrated 118K marketing prospects to MC Account Engagement.

Advanced Capabilities & Record Management Engineered eMoney financial planning integration, Egnyte document management, digital onboarding via Orion + DocuSign + Fidelity Wealthscape, and trade/options processing consolidation into standard Cases with Omni-Channel routing. Deployed 8 persona-driven Lightning interfaces for Advisors, Marketing, Operations, Trading, Reporting, Compliance, and Automated Activity Capture.

Custom Automation & Future-Proofing Engineered a proprietary automated client asset allocation and proposal workflow accelerating the sales cycle. Built FSC Action Plans for standardized client reviews and onboarding. Deployed white-glove service modules, automated client tiering, and predictive analytics foundations. Implemented Salesforce Shield and Field Audit Trail for immutable SEC-compliant record-keeping.

RIGOROUS DEPLOYMENT METHODOLOGY

Vantage Point conducted 8 weeks of granular discovery sessions with regional teams across multiple divisions—ensuring localized workflows and compliance requirements were fully captured before a single line of configuration was written. Systematically replaced 2,854 Apex classes and 15 Process Builders with native Lightning Flows, dramatically reducing developer dependency. Resolved 123% storage saturation through strategic archival. Completed comprehensive documentation and a structured technical handoff ensuring long-term platform autonomy.

WORKFLOW AUTOMATION

METRIC	BEFORE	AFTER VP DEPLOYMENT
System Architecture	Legacy SFDC: 2,854 Apex classes, 113 triggers, 194 Flows, 123% storage	**Clean FSC instance with declarative automation**
Advisor Workflow	Swivel-chair across 5+ systems	**Single-pane FSC workspace with 8 persona interfaces**
System Adoption	85% with high shadow IT usage	**95% in 90 days; shadow IT eliminated**
Admin Efficiency	Manual entry, logging, routing	**27% task reduction; 8–12 hrs/week recaptured**
Data Quality	Fragmented, incomplete profiles	**350% completeness improvement**
Compliance Posture	Manual audit prep across silos	**40% prep time reduction via Action Plans**
Sales Velocity	Manual lead routing, paper proposals	**20% cycle reduction via custom proposal automation**

TECHNOLOGY STACK

- Salesforce Financial Services Cloud
- Orion Connect (Portfolio/Custodial)
- Fidelity Wealthscape
- eMoney Financial Planning
- DocuSign (e-Signature + write-back)
- Egnyte (Document Management)
- MatchMyEmail (Activity Capture)
- Okta SSO (SAML)
- Salesforce Shield + Field Audit Trail
- MC Account Engagement (118K contacts)
- Zoom Integration
- Calendly Scheduling
- Microsoft 365
- Custom Proposal Automation

CLIENT TESTIMONY

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

— Senior 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 modernize your wealth management technology?

sales@vantagepoint.io | 469-499-3400 | vantagepoint.io