



Case Study

Digitized Core to Enable Expansion & Future Innovations for **Canadian Online Wealth Management Firm**

Client

The client is an online brokerage and wealth management firm, based in Canada.

Challenges

- ✓ Fostering synergies by migrating the organizational data & processes from the acquired entity over to the acquiring parent Salesforce organization
- ✓ Maximizing value of Salesforce investment, while decreasing TCO by creating a shared environment and leveraging the existing Salesforce modules
- ✓ Accelerating time-to-value by deploying must-have features before code freeze, and subsequently evolving the good-to-have functionalities.

LTI Solution

- ✓ Merged the data and processes into a single Salesforce-based organization and refined the data model
- ✓ Refined cross-organizational taxonomies and overlapping functionalities as per client standards
- ✓ Conducted thorough analysis and executed tech debt reduction of the Salesforce organization, thereby bringing technical efficiencies.

Business Benefits

- ✓ Created a shared environment & foundation for future innovation
- ✓ Enhanced the business platform to further enable cross-sell of offerings
- ✓ Elevated customer share of wallet across the parent organization's business lines

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