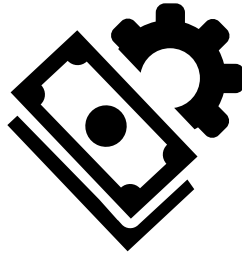




Quantitative Asset Management Firm :: Case Study

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About Our Client

Our client is a quantitative asset management firm that acts as a solutions provider with a singular focus on maximizing the after-tax wealth of investors. It pursues this objective by employing advanced portfolio engineering techniques honed over 20+ years in quantitative asset management to build customized solutions for sophisticated investors. Options range from more consistent and impactful approaches to index-based tax loss harvesting, solutions that aim to help investors keep more gains from tax-inefficient portfolio holdings, exchange fund alternatives for tax efficient diversification/hedging of concentrated stocks, and tax loss harvesting overlays on existing ETF or mutual fund holdings.

Challenge

- The company had a suite of disparate systems it used to generate and send out portfolio performance reports to its investment partners on a regular basis, but the process was far too inefficient to scale.
- They were using Salesforce strictly as a glorified rolodex to manage investor contacts, but they wanted to build a much more robust Salesforce instance to automate repetitive business processes in their organization.

Solution

- SM Innovations created a custom Account Hierarchy, Community User Profile, Sharing Model, and Portfolio Object in Salesforce to match the client's business model and compliance requirements.
- SM Innovations also created a custom Experience Cloud portal whereby portfolio managers can view and download performance reports on demand and even submit new portfolios for the client's approval.

Outcome

The client's primary stakeholders now benefit from having a 360-degree view of their investor relationships, portfolio performance, and important touch points that will allow them to make more informed business decisions.

The client's team now also has a lot more time to work on revenue-generating tasks now that performance reports are now seamlessly and automatically available for portfolio managers to review on demand in the Experience Cloud portal.

About SM Innovations

SM Innovations is a Salesforce consulting partner company based in Los Angeles. We are a tenacious group of ex-IBM digital strategy consultants, world class engineers, and highly talented designers, who set out to do what we love most – build premier quality, robust Salesforce applications. We pride ourselves on providing enterprise-level professionalism and delivery for every client and strive to build long-lasting relationships driving continuous success and innovation.