SM INNOVATIONS

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SageView :: Case Study

SAGE VIEW

About SageView Advisory Group

SageView Advisory Group is an SEC-Registered Investment Advisory firm (RIA) serving retirement plan sponsors and individuals throughout the United States since 1989. SageView advises on 401(k), 403(b), 457, defined benefit and deferred compensation plans, and provides comprehensive wealth management services to individuals and families. SageView is headquartered in Newport Beach, California, and has more than 30 offices nationwide.

Challenge

SageView acquired a group of wealth managers from Capital One and needed to equip them with the tools they needed to succeed from the beginning. The wealth managers previously used Financial Services Cloud at Capital One, so SageView wanted to create their own FSC org to allow the smoothest transition possible.

Solution

SMI took all the data from the legacy FSC orgs previously used at Capital One; cleaned the data; and successfully imported all Households, Financial Accounts, Personal Accounts, Advisors, and past Client Notes. SMI then facilitated a live training session for all financial advisors at SageView to ensure high user adoption.

Outcome

SageView was able to successfully onboard the new team acquired from Capital One and supply them with a system that is familiar to them. SMI has plans to work with SageView's executive leadership team and provide a success roadmap to help guide their digital transformation via Salesforce.