Financial Services - Credit Unions

STREAMLINING THE EMPLOYEE EXPERIENCE FOR FINANCIAL ADVISORS

SM Innovations helped our client's financial advisors sync their Outlook and Salesforce calendars and view more client data at a glance, making it easier for them to keep track of meetings and offer higher quality client support.

THE IMPACT

More centralization of client and prospect information

Meetings synchronized between Salesforce and Microsoft Outlook

"This was a smooth deployment, especially considering it was a complex one and there were over 300 lines in the deployment checklist."

- Client's Senior IT Project Manager

Based in the Pacific Northwest, our client is one of the largest private credit unions in the US. They provide services and tools to help their clients better understand and support their financial goals, currently holding over $30 billion AUM.

THE CHALLENGE

The client had an upcoming deadline to upgrade their integration between LPL Financial's Clientworks application and Salesforce. However, their advisors did not have their Salesforce Calendar and Outlook Calendar in sync, which made scheduling appointments with clients challenging. They also needed to be more ready for their LPL integration and upgrade to ClientWorks without losing data.

BUILDING OUR SOLUTION

Once we ensured a common vision of success and reviewed their current environment, we installed ClientWorks Connection from AppExchange while preserving all their past data as requested, and then configured bidirectional dynamic mapping.

To help the advisors sync Salesforce and emails, the SMI team leveraged Einstein Activity Capture for Outlook Meeting and Email Synchronization. The project team tested the above exhaustively to ensure the system performed without any flaws, ensuring that all data synchronization and reconciliation were perfect to build an optimal employee and client experience.

OUTCOME

The client's financial advisors now have more information at their fingertips regarding their clients and prospects based on the preservation of all historical LPL Clientworks fields and additional fields coming from the new AppExchange App. In addition, all advisor meetings are accurately synchronized between Salesforce and Outlook. Scheduling meetings with clients runs more smoothly than ever before.