CONSLEAGUE

salesforce PARTNER

CLIENT SUCCESS STORY

Vantage Wealth

Project
Salesforce Sales Cloud Quick Start project

Client
Vantage Wealth

Industry
FinServ – Wealth Management

Location
City of London

Products
Salesforce Sales Cloud

Wealth Management firm specialising in advising clients on their pensions, investments and insurance arrangements since 2006. They have been based in the Square Mile during that time, but as well as advising City professionals, have specialised most on supporting growing businesses all over the South East. They currently advise clients on over £25 million in assets, and have 200+ clients who trust them to create, build and protect their wealth.

The Business Challenge

Vantage Wealth had adopted a very manual paper process, little structure to a system heavily based on calls and information collected in spreadsheets with it being difficult to scale. The lack of structure made data analysis and insightful understanding of patterns and trends nearly impossible, leading to missed opportunities and frustration.

> **"When I came to Consleague with a sense of what I wanted, their approach was to first challenge my thinking, to relate the strengths of their expertise across all sectors and to then begin to define how the functionality of the Salesforce platform could achieve such an accumulation of marginal gains that it would lead to a leap in productivity in my own business."**
>
> James Armitage - Founder of Vantage Wealth

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The Solution

Our approach was designed to ensure Vantage Wealth achieved the maximum value from their Salesforce platform investment and engagement with Consleague.

Based on the feedback we have received during our initial discovery meetings, we were confident to recommend that our Salesforce Quick Start service would be appropriate to deliver Vantage Wealth's requirements with minimal overheads and, therefore, maximum return on investment.

This solution framework provided the features Vantage Wealth required immediately whilst allowing them the flexibility to develop the platform further in the future as their needs changed.

The Results

Rapid delivery of Application Management, Customer and Contact Management, Pipeline and Activity Management, Security Settings, Reports and Dashboard Management, Data Import

Key requirements:

- Provide a 360-degree view of clients
- Reduce costs associated with data capture and analysis, increase productivity, and free up time to focus on strengthening client relationships.
- Personalise interactions with client profiles centred on personal goals and pivotal life events.
- Nurture deeper relationships by staying in touch with event alerts that remind to reach out when clients need advice the most.
- Connect with clients from any device, build stronger relationships by engaging in seconds, respond to timely account alerts, and collaborate across the household on key life goals.
- Home page, powerful productivity tools and integrated industry apps to enable automated routine processes with customisable actions and client referral tracking to ensure opportunities are never missed.

Quick Start

Digitalisation of processes

Bespoke org fit for purpose

Flexibility to increase the system's functionality

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