

# “Salesforce Fix The Foundation” Project

Financial Services Customer Case Study

## Company Overview

Cetera Financial Group provides broker-dealer services, innovative technology, and competitive advisory programs for approximately 5,000 independent financial professionals and more than 700 financial institutions affiliated with its three independently managed broker-dealers: Financial Network Investment Corporation, Multi-Financial Securities Corporation, and PrimeVest Financial Services, Inc.

### Business Challenges

Cetera Financial Group faced challenges on 2 fronts



CFG’s Customer Support, Sales and Marketing divisions wanted to leverage a common operations and case management platform worldwide. The Salesforce application was primarily able to manage relationships with its agents and agencies. However, the existing Salesforce out of the box functionality could not be leveraged to its full potential thus calling for extensive customization. Inaccurate mapping of business process to Salesforce resulted in data anomalies and data redundancies consequently lowering user adaption and generating reports in Salesforce became a challenge. The users wanted intuitive User Interface and a Salesforce application design which was robust, secure and scalable as per business needs and that could easily integrate with in house legacy systems. These challenges had made the Software Project Management team at CFG initiate the ‘Fix the Foundation’ project.



It was also very important to ensure that software deliverables, upgrades, enhancements and releases related to business-critical applications met end-user requirements and performance criteria. The Project team needed an AppExchange application which could be integrated within Salesforce to track and deliver software projects to operational teams on time, within budget, with greater reliability at the same time following Agile based project execution methodology.

### Benefits



Conversion of B2C model to B2B model accurately fitted with CFG’s business model. This resulted into one-to-many Account-Contact relationship. Account hierarchy and account teams were introduced to streamline account management processes. The newly introduced opportunity record types gave an accurate visibility into the sales pipeline resulting into improved forecasting. The newly implemented application data model was normalized, relationship based and scalable resulting into 100% user adaption. The redesigned granular data security solution addressed all sensitive financial data accessibility issues making right data visible to the right users. The newly configured reports and dashboards summarized and displayed key business metrics accurately and with pin point accuracy resulted into improved decision making.



With the help of the Zen, the Stratitude’s Project delivery team was more consistently able to deliver accurate development projects—in time and on budget—while increasing the quality of new business applications. Having one place to access all quality artifacts (business objectives, exit criteria, requirements, test plan, test case and test scripts) helped improve productivity. The central repository, together with automated traceability, practically eliminated time spent on manual routine tracking and documentation. In addition, integrated processes, workflow and automated versioning and change management capabilities improved team collaboration and significantly reduced rework due to poorly communicated changes.

### Solution








CFG’s Software Project Management Team brought in Stratitude – Salesforce Partner, to provide Salesforce consulting experience to implement new and improved processes enterprise wide. Stratitude SFDC team brought the ‘Fix the Foundation’ project to a successful closure by completely redesigning the application data model to accurately map the CFG’s business process to Salesforce CRM. The redesigned user interface was intuitive and captured information accurately from business users. Salesforce Analytics was configured on top of newly designed data model to give management a visibility of key business metrics.

Stratitude’s Project delivery team identified and implemented the AppExchange package Zen to support complete end to end process mapping starting with - Release planning, Requirement management, Quality planning, Test execution, Defect management and Change request management. The team also defined workflow and approval processes, security and sharing model to automate, streamline and secure CFG’s processes and data. As a Salesforce Certified AppExchange Partner, Stratitude provided expertise in packaged application rollout and user training.

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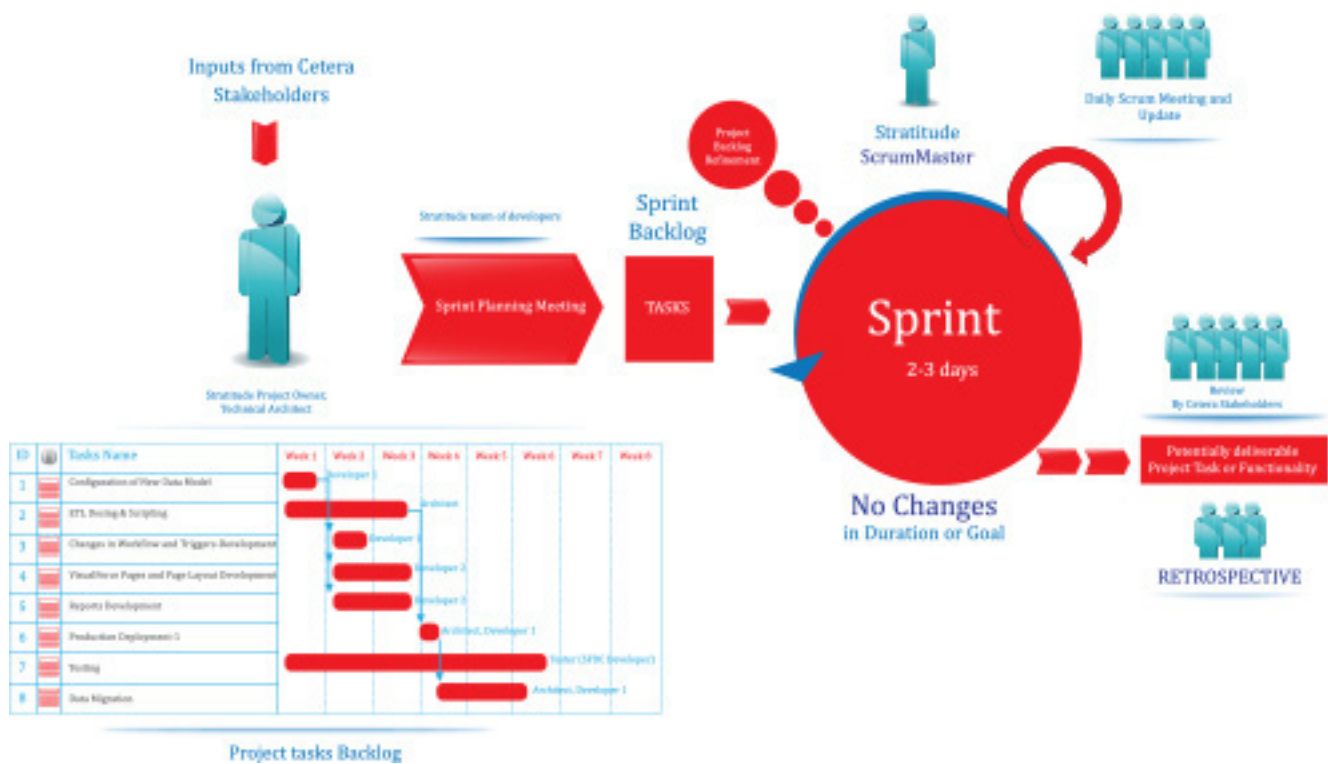
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### Key Implementation Highlights

-  An intuitive Salesforce user interface and business process automation was designed, tested and delivered to CFG which included data migration services in record 60 days.
-  Agile based project execution methodology was used for project management and delivery.
-  Team studied existing configured application and suggested normalized data model for opportunities.
-  The reconfigured Opportunity, Accounts and Contacts Objects eliminated data redundancies and accurately mapped fields to legacy systems streamlining system integration processes.
-  The team analyzed impact of moving fields from existing data model to proposed data model by analyzing field dependencies, formula fields, validation rule, reports, workflow processes and approval processes.
-  Impact Analysis of converting person accounts to business accounts to implement B2B model was documented and conveyed to project stakeholders.
-  The team developed more than 250 data load programs using Informatica data loader and to facilitate data migration from existing data model to new data model.

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## Stratitude Agile Implementation Methodology



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### Conclusion

-  Accurately mapped CFG’s business processes and data to Salesforce platform.
-  Improved business user productivity and time savings as the application reflected accurate and clean business data.
-  Highlighted key business metrics accurately on dashboards resulting in improved decision making by management.
-  Secured highly sensitive financial data making it accessible to users with right privileges.
-  Integrated with AppExchange package Zen to streamline end to end processes related to Software project deliverables.
-  Enhanced customer satisfaction and improved user adaption by complementary user training.

### CONTACT US

 39510 Paseo Padre Pkwy Ste 160  
Fremont, CA 94538

 (510) 709-4200

 sales@stratititude.com

 [www.stratititude.com](http://www.stratititude.com)