

Title

Data migration for a financial services company

Who is the client?

Synebo's client is an organization that opens and maintains U.S. investment and retirement accounts from Israel. They help clients with stocks, bonds, mutual funds, and more. They have licenses for conducting financial operations in both the United States and Israel.

About the client	
Industry	Finance and banking
Headquarters	Even Yehuda, HaMerkaz, Israel
Founded in	1997
Start of the project	June 2023
End of the project	April 2024

The challenge

The Synebo's client used the outdated CRM system Act!, which no longer met their needs. They sought Synebo's help to migrate data to Salesforce and implement Salesforce Financial Cloud to improve their CRM functionality.

The main challenges included:

1. **Data Migration Accuracy:** Ensuring accurate and complete data migration from Act! to Salesforce. This required meticulous data cleansing and validation to maintain data integrity.
2. **Customized Financial Cloud Implementation:** Designing and implementing Salesforce Financial Cloud to align with the client's specific business needs. This

involved configuring Salesforce to handle the unique data structures and workflows of Profile Investment Services.

In summary, Synebo's challenge was to **migrate data from Act! to Salesforce and customize Salesforce Financial Cloud** to meet Profile Investment Services' needs while ensuring data integrity and effective functionality.

Our solution

Synebo's migration of the client's data from Act! to Salesforce, including the implementation of Salesforce Financial Cloud, involved several key enhancements to ensure a seamless and efficient transition:

1. **Comprehensive data mapping and transformation.** Before the migration, we conducted several sessions with the client to identify and create necessary fields in Salesforce. This included splitting and transforming data to fit into appropriate fields, ensuring accurate and organized data migration.
2. **Customized form implementation.** We implemented a custom form for the client to use during phone calls, capturing specific information and fields required for their business processes. This tailored form streamlined data entry and improved client interaction efficiency.
3. **Integrated calendar and scheduling.** A calendar feature was developed to allow for scheduling meetings directly within Salesforce. This integration ensured that all appointments and meetings were seamlessly managed within the CRM system.
4. **Compliance with US regulations.** Given the client's operations in the US, we integrated DocuSign for the documentation signing process to comply with legal requirements. This ensured that all documents were signed securely and met regulatory standards.
5. **Additional business requirements.** We also integrated Outlook and Zoom to enhance communication and scheduling capabilities. These integrations ensured that all client interactions and meetings were efficiently managed within Salesforce.

In summary, Synebo's solution for Profile Investment Services included **comprehensive data mapping, custom form implementation, integrated calendar and scheduling, compliance with US regulations, and additional business integrations**, ensuring a smooth and effective transition to Salesforce Financial Cloud.

The result

As the Synebo's client's employees became more familiar with Salesforce's capabilities, we implemented and refined new features to meet their evolving business needs. Our top Salesforce consultant conducted several sessions with the company's head and team members, gathering regular feedback to ensure the system met their requirements. This ongoing collaboration led to a highly customized Salesforce Financial Cloud implementation, covering all aspects of their business operations.

At the end of the day, **the tailored solution has significantly improved their data management and client interaction processes, making their operations more efficient.** We continue to enhance and expand the system based on user feedback, ensuring it remains effective and responsive. This iterative approach has not only optimized their CRM functionality but also positioned them for future growth and scalability.

