

Industry

Technology &
Financial

Project Overview

Implement a centralized Salesforce CRM to consolidate data from two legacy systems, improve operational efficiency, and ensure high data integrity—delivering a unified platform that enhances client service and enables scalable growth.

Project Developed

- Salesforce
- Financial Services Cloud (FSC)
- Flows

Time Frame

10 Months

Case Study

*Unifying CRM Systems to Streamline
Operations for a Wealth Management
Technology Provider*



The Challenge:

The client, a CRM technology provider serving wealth management firms, needed to merge data from two disconnected CRM systems into a single, stable Salesforce environment.

Challenges included:

- **Data Fragmentation:** Inconsistent records and duplicate data spread across separate platforms
- **Integration Complexity:** Difficulty maintaining data quality and platform compatibility during migration
- **Risk of Business Disruption:** Ensuring a smooth transition without interrupting day-to-day operations
- **User Adoption:** Need for effective training to encourage adoption and full platform utilization

The Auxano Solution

Auxano executed a comprehensive CRM consolidation strategy, focused on accuracy, stability, and user enablement:

- **CRM Data Consolidation:** Extracted, mapped, cleansed, and migrated data from both systems into Salesforce
- **Data Integrity Assurance:** Rigorous testing and validation ensured consistency and accuracy across the unified platform
- **Custom Salesforce Setup:** Established a secure, stable Salesforce environment optimized for operational needs
- **Training & Enablement:** Delivered role-based training and user provisioning to support confident platform adoption
- **Post-Go-Live Optimization:** Provided continued support and system refinement to ensure long-term performance and usability

THE RESULTS!

- **37% Reduction in Operational Overhead through system consolidation**
- **95% Data Consistency achieved post-migration, with 42% fewer errors**
- **35% Cost Savings in annual CRM maintenance**
- **82% User Adoption Rate, with faster task completion and improved productivity**

Client Impact: By consolidating systems into a single Salesforce platform, the client eliminated redundancy, improved data accuracy, and empowered their team to work more efficiently—supporting better service delivery and long-term scalability.

