CASE STUDY

RJL Wealth Management, LLC

RJL Wealth Management, LLC (RJLWM) (www.rjlwm.com) is an SEC Registered Investment Advisor firm headquartered in San Diego, CA with offices and meeting locations nationwide.

Challenge

A long-time user of Salesforce.com, RJLWM had invested a significant amount of human and financial resources to customize their CRM platform. Despite the high level of customization, the firm's back office data were not integrated in its CRM. Consequently, RJLWM reached out to AppCrown requesting us to populate all back office information in their SalesForce CRM and also fully automate their firm's client account data loading process.

Solution

AppCrown partnered with RJLWM to craft a highly customized third-party integration and financial data aggregation solution that was complementary to RJLWM's version of SalesForce. The solution enabled RJLWM to include and display back office and financial account data in a highly effective and seamless way, as part of their CRM program.

Results

The ability to display back office and financial account data in their CRM solution along with specific AppCrown applications, such as *notes/activity viewer* and *financial views,* has enabled RJLWM to facilitate all aspects of its business interaction from a single platform. Ultimately, the data integration process has empowered the firm to reduce data redundancies and error, and attain a higher level of efficiency.