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## Greene Wealth Management Improves Its Technology Infrastructure Using [salesforce.com](https://www.salesforce.com) and Force by Design

### Greene Wealth Management

#### CASE STUDY

A financial services company based in East Lansing, Michigan, improves its technology infrastructure and service abilities using [salesforce.com](https://www.salesforce.com) and Force by Design

#### CHALLENGE

A cumbersome legacy system and outdated task management system usurped valuable time that could better be spent maximizing clients' wealth

#### SOLUTION

With [salesforce.com](https://www.salesforce.com), staff can effortlessly track portfolios and personal milestones to best prepare clients for the future

#### RESULTS

Effortless file management allows staff to focus on helping clients realize financial stability

#### The Challenge

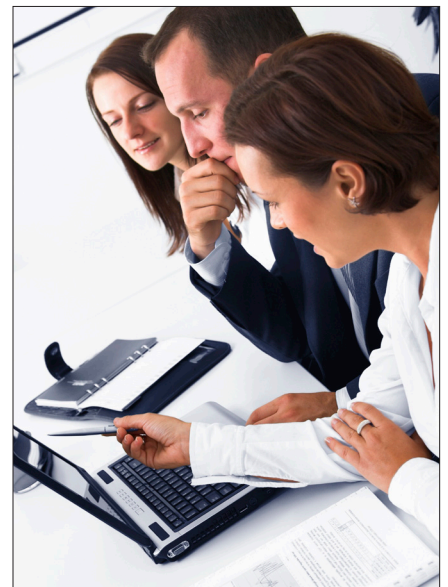
Greene Wealth Management (GWM) offers comprehensive financial planning to help clients make informed decisions aimed at maximizing and preserving their wealth. GWM allocates daily tasks across team members to stay on top of ever-changing financial data and ensure client needs are met. To keep track of these tasks, the team at GWM had been using an outdated and inefficient central whiteboard system.

GWM sends weekly reports to clients based on specified portfolio criteria, a process that was cumbersome and difficult to achieve under its legacy system. Because the old system did not provide an intuitive method of accessing important client information, staff spent valuable time searching through files to identify and organize records. Most importantly, the team lacked easily accessible, up-to-the-minute financial data on clients' wealth levels—information that would allow GWM to provide the best possible advice at any given point in time.

#### The Solution

Wealth management organizations maximize their clients' financial well-being by ensuring that their investments are smart and safe. To accomplish this, financial advisers need high visibility into current client portfolios.

The ability to see client investments and demographics at a glance allows advisers to confirm that items such as required minimum distributions are responsibly maintained. With [salesforce.com](https://www.salesforce.com), wealth management organizations can effortlessly track portfolios and personal milestones to best prepare clients for the future.





*“Force by Design set reasonable expectations for data migration. They took the time to understand our needs as a company, thus incorporating custom reports and tools. Our team leader, Nick Fusi, always makes us feel like he is right across the hall if we have any problems or questions.”*

Richard Greene,  
CFP, Founder of Greene Wealth Management

## The Results

Greene Wealth Management realized instant gains in data visibility after migrating its client and activity information from its legacy system to salesforce.com. Team members across the organization now quickly and simply assign, monitor, and manage daily tasks and meetings at any time and from any place with an Internet connection. This alone has allowed GWM to stay organized and focus on what matters most: helping clients realize financial stability.

Since the company deployed salesforce.com, GWM staff have more time to develop new client relationships and expand current clients' portfolios. With reports and dashboards showing continually updated financial figures for every client, GWM staff no longer need to search for data and insight into clients' wealth. Custom reports and personalized list views allow GWM staff to better prepare for client meetings, identify clients by specific criteria, and utilize email templates to communicate important financial information with just a few clicks.

## About Greene Wealth Management

Greene Wealth Management (GWM) is an independent financial investment group helping people reach their financial potential through thoughtful planning, diligent research, and uncompromising service. We help our clients uncover their wants, their dreams, and their goals; leaving a legacy to those who follow. For more information, visit [www.greenewm.com](http://www.greenewm.com).

## About Force by Design

Founded in 2008, Force by Design, Inc., helps organizations of all sizes use the power of cloud computing to run mission-critical business applications on the salesforce.com platform. Headquartered in San Francisco with offices in East Lansing, Michigan, our consultants have completed more than 1,000 client engagements. We implement and optimize cloud-based applications, helping organizations put their applications in the cloud along with our own. For more information, visit [www.forcebydesign.com](http://www.forcebydesign.com).

## Contact Us

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