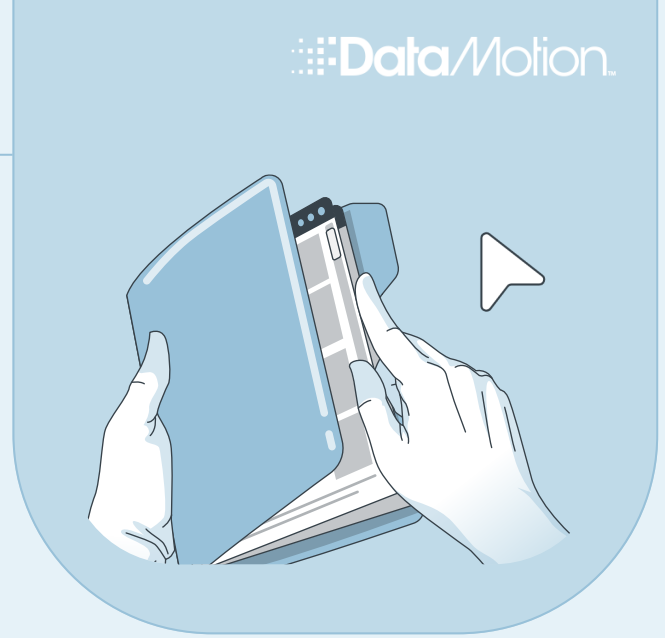


## Client Case Study

# Seamless Messaging Transition for a Leading Wealth Management Firm

A global wealth management firm needed a new secure messaging solution after their legacy provider announced end-of-life support. They required a quick replacement to maintain communication and compliance.



**\$875 Billion**

assets under management

**10,000 +**

wealth management advisors

**2 Million +**

clients across the globe

“With no adequate migration path provided by the legacy vendor, “challenge” turned out to be an understatement.”

## Challenge

The new solution needed to integrate via API into the firm’s client services portal, ensuring regulatory compliance throughout the transition.

**6-9 Months**

To find and implement a new solution.

**2 TB**

Client-advisor message data to migrate.

The solution had to replace the legacy system while preserving the existing infrastructure and user experience.

## Solution

DataMotion implemented a secure message center tailored to the firm’s needs, ensuring a smooth transition and enhanced functionality. Key features included:



### Cloud Deployment

Azure solution with REST APIs for existing infrastructure and Microsoft Outlook integration.



### User Experience

Maintained familiar interface within the client portal for advisors and clients.



### Enhanced Security

SSO integration via Okta and advanced compliance measures.



### Data Continuity

Successful migration of 2TB of client-advisor message data.

## Results

DataMotion delivered a seamless transition, enhancing functionality, security, compliance, and scalability. The solution enabled cost-effective integration without a "rip and replace" approach, preserving the familiar user experience:

### 10,000 + Messages

processed on day one,  
ensuring no disruption for  
clients and advisors.

### Zero Retraining

required for employees,  
maintaining operational  
efficiency.

### 32% Reduction

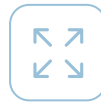
in contact center calls  
after implementing the  
secure message center.

## Benefits



### Seamless Communication

Secure messaging between clients  
and advisors in a familiar interface.



### Scalable Infrastructure

Azure-based cloud deployment  
for future growth.



### Rapid Deployment

Solution implemented within the  
tight 6-9 month timeframe.



### Enhanced Compliance

Automated reporting and  
advanced security measures.



The best fit for us would be taking our existing services and swapping out the previous product logic that we communicated with – and that just wasn't possible with other vendors... With DataMotion, we could. We were able to still use our mailboxes and they had the APIs we needed to manage our message center. It was the ideal solution.

- **Solutions Architect**



## Future Outlook

- ✓ Leverage DataMotion's expertise for enhanced messaging.
- ✓ Continue transitioning services to the cloud for better scalability and lower IT costs.
- ✓ Further streamline communications for improved outcomes and reduced costs.

Looking for a seamless, secure messaging solution?

Contact us to learn how we can help.



 **DataMotion**

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