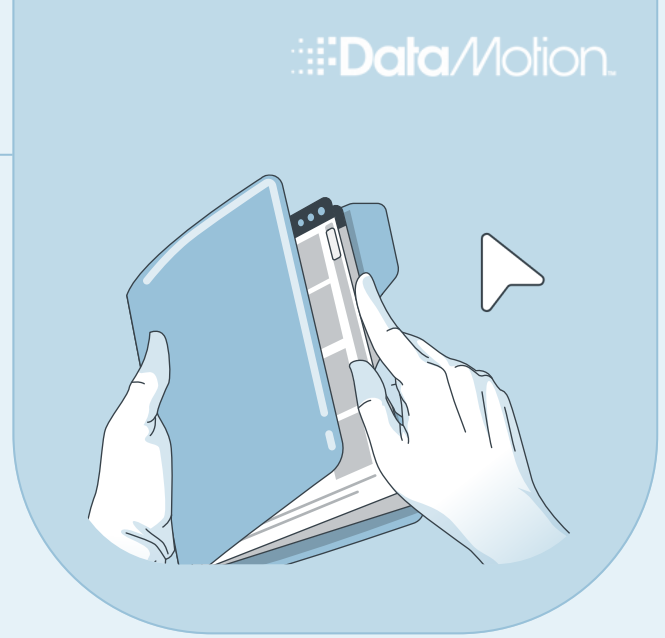


Client Case Study

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, eliminating multiple, disjointed systems while ensuring regulatory compliance.

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:



User Experience

Embedded secure messaging solution within advisor and client portal.



Cloud Deployment

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



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, and scalability. The solution enabled cost-effective integration without a "rip and replace" approach, preserving the familiar user experience and eliminating point solutions:

32% Reduction

in contact center calls after implementing the secure message center.

Embedded Solution

within existing client and advisor portal, improving user experience.

Zero Retraining

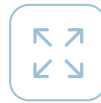
required for employees, maintaining operational efficiency.

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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