June 2026 Read Time: 5 Mins.

Case Study

Unifying Wealth Advisory Operations on Salesforce FSC for a Leading Canadian Bank

Overview

A leading Canadian bank wanted to modernize its international wealth management operations by reducing advisors' dependence on multiple disconnected systems for accessing customer information, portfolio data, and proposal workflows. The bank required a unified platform to improve advisor efficiency, provide a consolidated client view, and support scalable multi-country operations across LATAM and Caribbean markets.

Tech Mahindra implemented the Wealth+ Financial Services Cloud (FSC) platform to centralize advisor workflows, integrate legacy banking systems, and enable real-time access to client and wealth data. The solution helped streamline operations, improve client visibility, and support a consistent wealth management experience across regions.



Client Background and Challenges

The bank is one of Canada's leading multinational banking and financial services institutions, with a significant presence across the LATAM and Caribbean markets. Its international wealth management operations relied on multiple disconnected systems for accessing client information, portfolio performance, and proposal workflows. Advisors often had to navigate across several platforms to gather customer insights and create proposals, increasing administrative effort, and reducing productivity.

The lack of a unified client view also limited the ability to deliver personalized wealth advisory services and access real-time portfolio information efficiently. In addition, the bank required a scalable platform to support standardized wealth management operations across multiple regions while minimizing changes to existing business processes.



Our Approach and Solution

To address this challenge, the Wealth+ Financial Services Cloud (FSC) digital servicing platform was implemented for wealth managers and advisors in international wealth management operations. The platform enables advisors to access a 360-degree view of clients, enhance planning capabilities, and interact with clients through a centralized interface.

The Wealth+ FSC implementation was integrated with core banking and legacy applications, including Pro, Globe, DBSYNC, ESLM, and LAM, using Talend and Kafka-based integration. This enabled real-time and batch synchronization of client and wealth data across systems.



Solution Highlights

- A multi-country rollout of the platform across Peru, Chile, Mexico, and countries in the Caribbean region
- Support for high-net-worth retail and wealth corporate customers
- Lead and opportunity process optimization
- Reduced unnecessary field capture and manual clicks
- Improved screen layouts by consolidating relevant customer information
- Talend and Salesforce API implementation for real-time and batch synchronization between the underlying systems and the financial wealth data hub

Business and Community Impact

This section should clearly articulate the outcomes achieved through the engagement and is critical to the effectiveness of the case study. Wherever possible, benefits should be quantified using concrete metrics such as cost savings, efficiency gains, or performance improvements. If results are not yet available, the client's measurable goals may be referenced with appropriate context.



Standardized Multi-Country Operations

tables migrated with preserved metadata and history.



Improved Advisor Productivity

Reduced advisor dependency on multiple systems by integrating underlying applications and enabling real-time data synchronization across platforms.



Enhanced Operational Effectiveness

Leveraged Salesforce FSC features and the related data model to integrate local legacy systems with Salesforce, enabling advisors to access a 360-degree client view within a centralized interface.

Out-of-the-box FSC capabilities, including Households, Rollups, and Life Events, were utilized to improve client visibility and workflow efficiency synchronization across platforms.

Optimized Data Availability

Enabled real-time, near real-time, and batch availability of wealth data across product offerings to support customer servicing requirements. The use of Talend and Kafka helped optimize resource utilization by reducing API processing overhead on Salesforce.

Scalable Solution Deployment

Delivered a stable solution that supported multi-country rollout with minimal changes to existing business processes.



About Tech Mahindra

Tech Mahindra (NSE: TECHM) offers technology consulting and digital solutions to global enterprises across industries, enabling transformative scale at unparalleled speed. With 149,000+ professionals across 90+ countries helping 1100+ clients, Tech Mahindra provides a full spectrum of services including consult-ing, information technology, enterprise applications, business process services, engineering services, network services, customer experience & design, Al & analytics, and cloud & infrastructure services. It is the first Indian company in the world to have been awarded the Sustainable Markets Initiative's Terra Carta Seal, which recognises global companies that are actively leading the charge to create a climate and nature-positive future. Tech Mahindra is part of the Mahindra Group, founded in 1945, one of the largest and most admired multinational federation of companies. For more information on how TechM can partner with you to meet your Scale at Speed™ imperatives, please visit https://www.techmahindra.com/.

TECH mahindra

www.techmahindra.com
www.linkedin.com/company/tech-mahindra
www.twitter.com/tech_mahindra

Copyright © Tech Mahindra Ltd 2026. All Rights Reserved.

Disclaimer: Brand names, logos, taglines, service marks, tradenames and trademarks used herein remain the property of their respective owners. Any unauthorized use or distribution of this content is strictly prohibited. The information in this document is provided on "as is" basis and Tech Mahindra Ltd. makes no representations or warranties, express or implied, as to the accuracy, completeness or reliability of the information provided in this document. This document is for general informational purposes only and is not intended to be a substitute for detailed research or professional advice and does not constitute an offer, solicitation, or recommendation to buy or sell any product, service or solution. Tech Mahindra Ltd. shall not be responsible for any loss whatsoever sustained by any person or entity by reason of access to, use of or reliance on, this material. Information in this document is subject to change without notice.