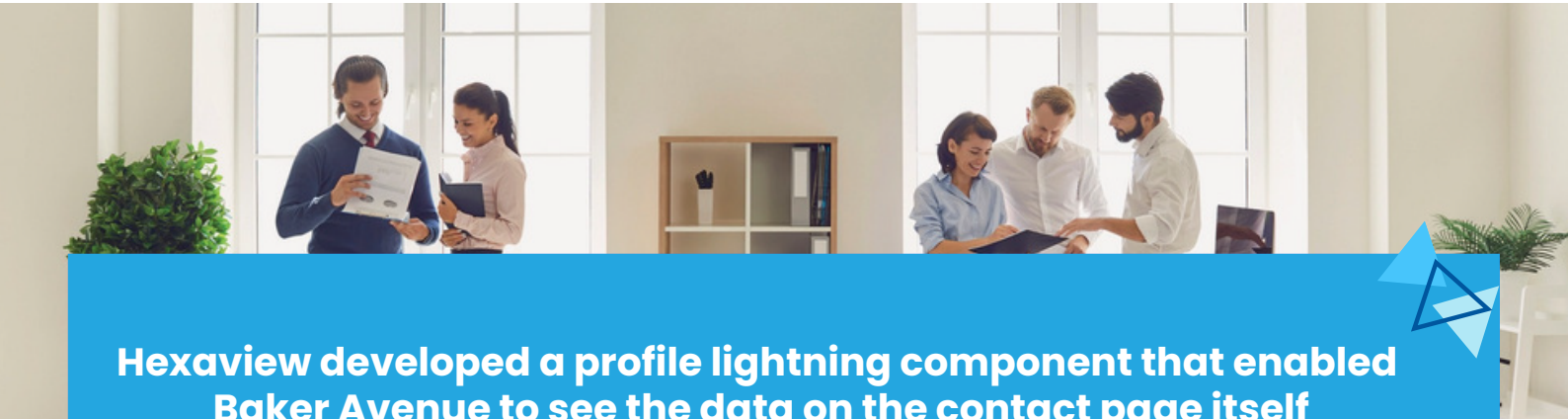




Hexaview developed a profile lightning component that enabled Baker Avenue to see the data on the contact page itself

About the Company

Baker Avenue is a leading wealth management firm founded in 2004 that assists clients in wealth and asset management, including personal and professional assets and wealth management. For high-net-worth individuals, families, trusts, foundations, and endowments, the firm offers comprehensive wealth management and investment expertise. The organization seeks to have a positive impact on society in addition to generating profit since it is motivated by a special goal of serving humanity. The company has a strong presence in New York, Dallas, Seattle, San Diego, and Sun Valley, with its headquarters in San Francisco.

Business Goals

Baker Avenue aimed to streamline their wealth management operations through digital transformation. Their primary objective was to implement efficient data management systems that would enhance client service delivery while improving operational efficiency. They sought to automate manual processes, improve data visibility on contact pages, and establish seamless communication workflows with their advisory teams to drive better client outcomes.

Challenges

The client faced significant operational inefficiencies including inability to arrange box folders according to their specific needs and requirements. They struggled with tracking changes in profile data and faced difficulties with manual email communications to their advisors. Additional challenges included limited visibility of trading account data on contact pages, creation of unnecessary folders with new contacts, and lack of centralized research note management for investment teams.

Industry

Wealth Management

Why Hexaview

- Leading service provider in the industry
- Insightful and Experience Team
- Client-First Approach
- Utter Transparency & Honesty
- Flexible & Dynamic
- Exceptional Quality

Solutions

Hexaview tackled these challenges by implementing a robust solution:

- Developed profile lightning component enabling data visibility on contact pages.
- Created automated folder arrangement system based on client requirements.
- Built comprehensive tracking system for client profile data changes.
- Designed automated email workflows for advisor communications based on conditions.
- Implemented Red Black component for trading account information display.
- Established research note management system with notification capabilities for financial advisors.
- Created Black Diamond tabs integration for smoother user experience.

Impacts

- Our team achieved 78% faster folder organization and arrangement.
- We delivered 65% improvement in wealth management app usability.
- The solution enabled 52% faster research note addition process.
- Our team generated 71% better client profile data tracking.
- We reduced manual email workload by 84% through automation.
- The solution provided comprehensive trading account visibility on contact pages.

Client Testimonial

"Hexaview is a thorough strategic partner. The team is well informed on every aspect of Salesforce and there are no issues the team cannot accomplish. Our Salesforce environment is deeply customized with numerous integrations. With that said, our requests were not basic. The Hexaview team engaged into every element of what we wanted to achieve. They established a detailed gameplan, executed timely, and communicated consistently along the way. There were minimal surprises. We are happy with how everything turned out and plan to engage with them again in the very near future. I completely endorse Hexaview!"

– Michael Dely, Baker Avenue

About Hexaview:

A digital transformation firm focused on providing Technology Consulting, Development Centre, and Captive as a Service with an innovative approach and the latest technology. With financial and technology insights, Hexaview Technologies endeavors to provide secure, optimal, and quality solutions to all your unique business requirements. Hexaview thrives on the principle of trust and integrity, values relationships, and commits to promises. Hexaview believes in fulfilling commitments with the best possible Solution, leaving no stone unturned in providing exemplary service. Hexaview is here to see you reach and surpass every goal!

Contact details:

+1 (845) 653 3855

hello@hexaviewtech.com

**Inc.
5000**