



SHORT FACTS

Country/Region

USA, North America

Industry

Finance

Profile

WealthVest Marketing, San Francisco (California) is a financial services distribution firm that specializes in high-quality fixed and fixed-index annuities. WealthVest's commitment to delivering innovative marketing tools, an unsurpassed support system, and intellectual capital help to make the best financial advisors even better.

Requirements

There were several issues, such as low efficiency in data management using direct SQL and custom databases. Information often was out of date or incorrect because it was not managed directly by the business.

Solution

Issues could be solved by seamless integration of back-end databases into the existing Microsoft SharePoint portal using the Layer2 Business Data List Connector.

Benefits

- Data can be managed directly by the business users in Sales, Operations & Marketing, and IT.



By using the Layer2 Business Data List Connector for SharePoint (BDLC) we can provide native SharePoint lists as a simple, easy-to-use, and familiar interface to manage mission-critical business data. We have an instantly operational user interface that takes seconds to be setup, requires no user training, and addresses our immediate business data management needs.

Dan Goldman, IT WealthVest Marketing, Inc.



CASE STUDY

WealthVest Marketing benefits from SharePoint data integration using Layer2 Business Data List Connector

PROJECT

Our customer WealthVest Marketing is using a legacy CRM system which is severely limited in its expandability and does not support master-detail relationships or other important entities outside of contacts. Their internal business model is rather complex. In their daily business they process SQL/DBMS combining the CRM information and other data imported for agency management, with their own custom tables. They are using Microsoft SharePoint lists and the Layer2 Business Data List Connector for these latter tables, which contain important details of business deals, sales hierarchies, and marketing program information, which are used to drive critical business reports.

SHAREPOINT EXTERNAL DATA INTEGRATION TO MAXIMIZE THE LEVERAGE OF THE EXISTING PLATFORM

WealthVest's situation before the usage of our BDLC was an inefficient, chaotic, and nontransparent data and communication situation. As a consequence, their departments were not aware of all kind of data changes and updates, due to a complex process of alerting.



- No new tools or user training required.
- Existing SharePoint infrastructure is leveraged.
- No custom development required.
- Ready in just seconds.

Hardware/Software

Microsoft Windows Server
Microsoft SharePoint Server
Microsoft SQL Server
Layer2 Business Data List Connector

More information

About Microsoft Office 365:
<https://products.office.com>

About WealthVest:
<https://wealthvest.com>

About Layer2 Solutions:
<https://www.layer2solutions.com>

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“According to my philosophy, the IT’s mission is to provide systems to empower users. At the same time, being of very limited resources, we have to be extremely vigilant about what technologies we adopt. We need to maximize our leverage of existing infrastructure so as to save in purchasing, development, and maintenance costs. It is very important that we do not become a software development company.

By using the Layer2 Business Data List Connector we did not have to adopt new technologies, learn new development environments, or do programming. Our business users including Sales, Marketing, and even IT can now own and manage their own data, ensuring its integrity, all the while making it promptly to IT for mission-critical reporting,” describes Dan Goldman, Vice President IT of WealthVest Marketing, Inc.

ABOUT WEALTHVEST

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ABOUT LAYER2 SOLUTIONS

Layer2 leading solutions is the market-leading provider of data integration and document synchronization solutions for the Microsoft Cloud, focusing on Office 365, SharePoint, and Azure. Over 200 regional implementation partners and more than 2.500 companies worldwide trust in Layer2 products to keep data and files in sync between 100+ systems and apps in the cloud and on-premises.