

PORTAL FOR RETIREMENT ADVISORS ON SALESFORCE COMMUNITY CLOUD



SCAN ME

"I count on ECHO for technology, to plan the work, and to keep me informed of the progress. They have been a true partner for us through multiple business cycles and transitions from project ramp-up to maintenance support."

- Scott Strait - Founder & CTO, RetireOne

GOAL

Implement a new advisor portal using Salesforce Communities. Include authentication and authorization; referral creation and tracking, and policy status including holdings.

CHALLENGE

Advisors were unable to submit and manage data, lacked a security model that allowed sharing data with external users, and did not have an efficient communication method between Aria and its advisors.

SOLUTION

ECHO created an online portal that enabled advisors to:

- Review and modify data
- Submit referrals
- Track approval status
- Track policy status and holdings
- Comment on records and message staff

INDUSTRY: FINANCIAL SERVICES

Retire One is a leading platform for guaranteed retirement income.

RESULTS

SAVED TIME

by implementing a new advisor portal.

INSTALLED

a security model that allowed sharing data to external users.

ENABLED

advisors to review and modify data.