



CLIENT CASE STUDY:
Professional Services – Systems Integration

A 360° enterprise data view.

Faced with siloed systems and limited data access, a financial services firm turned to SEI Professional Services to modernize their technology ecosystem. We delivered an end-to-end integration solution that centralized data, automated workflows, and created a single source of truth—transforming how the firm interacts with data and drives strategic decisions.

Main drivers for change.

In a competitive industry like financial services, speed is key. As client expectations evolve and the demand for data-driven decision-making increases, financial advisors need to be able to source and analyze data across multiple systems and books of business. Poor systems integration can lead to increased operational costs, unsustainable manual fixes, and data inconsistencies among departments and users.

This is the problem a financial services firm was facing when they engaged with SEI's Professional Services. The firm had allocated systems across various books of business on a variety of platforms. Without an established data flow between these systems, they had difficulties obtaining comprehensive insights across their businesses. Lacking a single source of truth, the firm faced challenges making timely, informed decisions.

A comprehensive solution for multichannel data.

Our Professional Services team partnered with the firm to design and implement a 360-degree solution for multichannel data delivery, built to streamline access to information across the organization. The goal: to create a single, trusted source of truth by connecting the firm's key data systems.

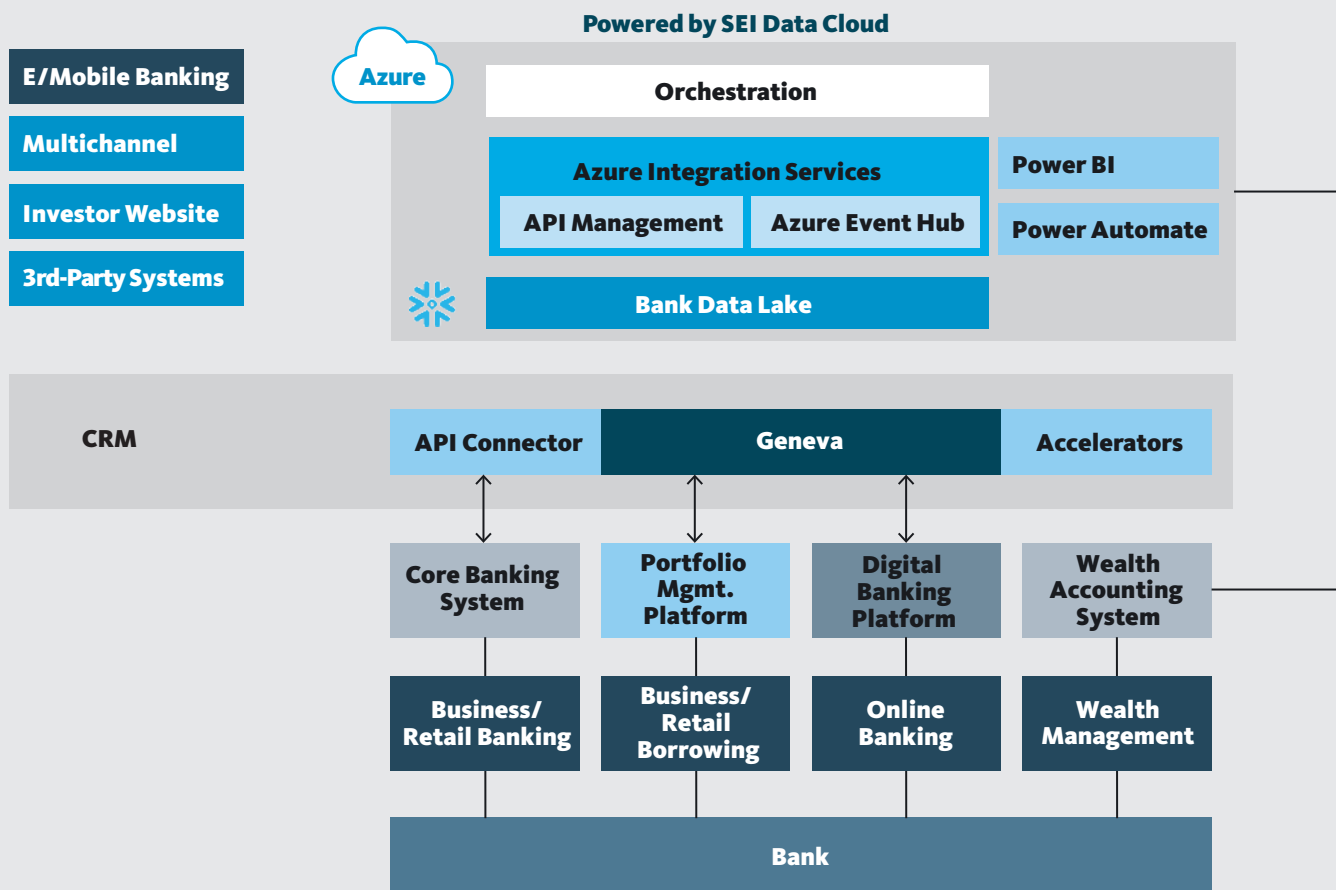
To achieve this, we integrated the client's distributed systems—including CRM, third-party providers, and internal accounting platforms—into a unified enterprise data lake within the SEI Data Cloud. This enabled the firm to move beyond siloed system views and gain access to data from all business units, regardless of the platform they operated on.

Integrating CRM data was among the firm's most pressing challenges. We resolved this by bringing CRM data directly into the SEI Data Cloud and combining it with data from other critical sources. From there, the team developed a 360-degree view of the firm's end-customer data, using a suite of customized management information dashboards. These dashboards provided intuitive, visual insights that allowed the firm to better understand customer behaviors, trends, and business performance.

Beyond integration and visibility, we also focused on improving operational efficiency. By leveraging workflow automation through SEI Data Cloud and Power Automate, the firm was able to reduce manual processes and accelerate routine tasks—freeing up internal teams to focus on higher-value work and timely decision-making.

CLIENT PROFILE

A commercial and consumer financial firm overseeing about \$13 billion in assets under administration (AUA). They offer a comprehensive range of wealth management services, including trustee services, estate planning, and 401(k) plan administration.



For illustrative purposes only.

Choosing SEI Professional Services meant more than just solving a technical problem—it gave the firm a strategic partner with deep domain expertise and a practical understanding of the financial services landscape.

By combining technical know-how with platform fluency—including expertise across third-party vendors and proprietary systems like the SEI Wealth PlatformSM—SEI served as a single point of contact to manage complex integration efforts and vendor relationships. This streamlined project execution and helped the firm avoid the inefficiencies of working with multiple, siloed providers. From early-stage strategy and planning through data mapping, API development, and workflow automation, our team delivered both speed and precision. Every element—from data migration to custom dashboard development—was built to reduce manual errors, improve cross-platform connectivity, and ultimately enhance the end-client experience.

Engaging with SEI's Professional Services not only accelerated the firm's time to value but also laid the groundwork for future scalability. With a robust, centralized integration framework in place, the firm is now positioned to make faster, data-driven decisions—without being constrained by legacy limitations.

Our systems integration service.

By seamlessly connecting your technology ecosystem end-to-end with SEI's systems integration services, you can combine the virtual and physical components of your business IT environment into a single, cohesive system.

Potential scope

- Technology integration analysis, strategy, and planning
- Technology integration design, architecture, and integration orchestration
- Data mapping
- Custom API, Extract, and Loader development and integration
- Workflow automation
- Test and quality assurance
- Data integration/migration
- Platform migration/implementation
- Build and improve system-to-system connectivity

Potential benefits

- Performance optimization
- Faster integrations
- Reduced manual error
- Improved end-client experience
- Minimized tech debt
- Enhanced collaboration

