FTSE 100 Investment Management Firm Unifies Sales Data Across Core Systems

Reduced integration change cycles from months to days

Improved audit readiness across sales and remuneration processes

Eliminated recurring reconciliation efforts

SITUATION

A FTSE 100 investment management firm operating in a highly regulated environment relied on multiple core systems to support its advisor-led sales model. Client relationships were managed in CRM platforms, financial transactions flowed through policy administration and investment systems, advisor structures were maintained in HR platforms, and finance teams depended on separate accounting and reporting tools.

As the firm expanded its product portfolio and evolved advisor remuneration structures, sales performance and remuneration processes became increasingly dependent on data flowing consistently across the enterprise. Accuracy, traceability, and governance were critical, not only for operational efficiency but also for regulatory compliance.

CHALLENGE

Over time, integrations between systems had been built incrementally, often as point-to-point connections designed to meet immediate needs. These integrations were tightly coupled to specific system schemas, making them brittle as underlying systems evolved. Changes to advisor hierarchies, product classifications, or remuneration rules frequently required IT intervention and extended release cycles.

Manual reconciliation became a recurring necessity during remuneration cycles and regulatory reporting periods. Confidence in downstream outputs relied heavily on manual checks and institutional knowledge, increasing operational risk and limiting the organization’s ability to adapt remuneration models quickly.

SOLUTION

The firm adopted a centralized, metadata-driven integration approach that treated sales, advisor, and financial data as part of a single governed model. Core systems were connected through declarative mappings and standardized data definitions, allowing transformations, validations, and enrichment logic to be managed centrally rather than embedded in custom code.

This approach decoupled integration behavior from individual source systems. When advisor structures changed, new investment products were introduced, or regulatory classifications were updated, remuneration-related data logic could be adjusted without rebuilding integrations. Automated validation and dependency tracking ensured changes were detected early and resolved before impacting downstream processes.

OUTCOMES

The firm significantly improved the resilience and transparency of its sales and remuneration data flows. Integration changes became faster and safer, auditability improved across remuneration and reporting processes, and manual reconciliation effort was substantially reduced. Most importantly, the organization gained the ability to evolve its remuneration structures without treating integration changes as major IT initiatives, balancing agility with the governance expectations of a FTSE 100 financial institution.