



Country / Region

San Francisco, CA / US

Customer Profile

WealthVest Marketing 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 helps to make the best financial advisors even better.

Customer Issue

Low efficiency in data management using direct SQL and custom databases. Data often is out-of-date or incorrect because it is not managed directly by the business.

Layer2 Solution

Seamless integration of backend databases into the existing Microsoft SharePoint portal using the Layer2 Business Data List Connector.

Customer Benefits

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

WealthVest Marketing Benefits From SharePoint Data Integration Using Layer2 Business Data List Connector

„ By using the Layer2 Business Data List Connector for SharePoint app we can provide native SharePoint lists as a simple, easy-to-use, and familiar interface to manage mission critical business data. We have a ready-to-go out-of-the-box user interface that takes seconds to setup, requires no user training, and addresses our immediate business data management needs.“

Dan Goldman, Vice President IT WealthVest Marketing, Inc.

At WealthVest Marketing we are currently using a legacy CRM system (due to be replaced next year) which is severely limited in its expandability and does not support master-detail relationships or other important entities outside of contacts. Our business model is quite complex and we do quite a bit of SQL/DBMS processing combining the CRM data and other data we import for agency management, as well as our own custom tables. It is these latter tables, which contain details of business deals, sales hierarchies, marketing program information, etc. that are used to drive critical business reports and processes such as commission processing that we would use [Microsoft SharePoint](#) lists for.

SharePoint external data integration to maximize the leverage of the existing platform

The current situation is that IT is required to setup these tables and manage their data. However, this is data that really should be owned and managed by the business. The consequence of this situation is that the business is not even aware of this data and often it is out of date and incorrect, leading to much rework at times, consisting of emails back and forth and IT managing the data

- No new tools or user training required. Existing 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 for SharePoint

About Microsoft SharePoint:

<http://sharepoint.microsoft.com>

About Layer 2 GmbH:

<http://www.layer2.de>

About WealthVest Marketing:

www.wealthvest.com

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through the back end. Not very efficient to say the least.

“My IT philosophy is that it is IT's mission 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 and 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”, Dan Goldman, Vice President IT WealthVest Marketing, Inc. describes the current state.

Layer2 Business Data List Connector for SharePoint is ready-to-go in just seconds

This is where the [Layer2 Business Data List Connector for SharePoint \(BDLC\)](#) comes in. By using the BDLC we can provide a simple, easy-to-use, and familiar interface (native SharePoint lists) to manage mission critical business data. We will not need to adopt new technologies, learn new development environments, or program. We have a ready-to-go out-of-the-box user interface that takes seconds to setup, requires no user training, and addresses our immediate business data management needs. Our business users including Sales, Operations, Marketing, and even IT can now own and manage their own data, ensuring its integrity, all the while making it immediately available to IT for mission critical reporting and business processing.

About WealthVest Marketing, Inc.

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Customer Solution Case Study



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About Layer 2 GmbH

As a Microsoft Gold Certified Partner and ISV based in Hamburg (Germany), Layer2 is one of the leading providers of Microsoft SharePoint and Office 365 apps in Europe with a major focus on Data Integration, Collaborative Knowledge Management and Social Networking. Layer2 has also been known as a reliable partner to customers in Central Europe, offering additional consulting and services in the fields of SharePoint, .NET programming and IT infrastructure for more than 20 years.