



# From Legacy to **AI-Ready**

Dual-track **CRM & Data Warehouse**  
Modernization for a Financial Services  
Organization

*A Ccube Case Study*



# Problem Statement

A growing financial services organization reached a critical inflection point. Two foundational systems were simultaneously constraining growth, client service, and strategic ambition.

## Salesforce Classic CRM

Patched and customised well beyond its intended design, unable to provide a unified client view. Advisors were working from fragmented, siloed data with no real-time relationship mapping.



01

02



## Legacy SSIS Data Warehouse

Ageing SSIS pipelines could no longer keep pace with the volume, velocity, or variety of data the business demanded. Brittle jobs caused silent failures and stalled decision-making.

Together these represented a systemic risk to client service, informed decision-making, and competitive positioning.

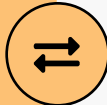
# Solution

Replacing legacy complexity with purposefully designed, cloud-native architecture across both workstreams.



## Salesforce Classic → Salesforce FSC (Financial Services Cloud)

**Data Mapping & Structuring** — restructured legacy schemas to match the FSC (Financial Services Cloud) data model, replacing custom objects with native Financial Account, Household, and Relationship structures.



**Data Cleansing & Validation** — eliminated redundant records and enforced data integrity across the full client hierarchy.



**Compliance & Security** — enforced security controls to meet financial regulations, with role-based access across all FSC structures.



**Actionable Relationship Center (ARC)** — advisors now have a real-time, 360-degree view of clients, households, and entity relationships.



## SSIS → Databricks on Azure (EDW Modernisation)



**Medallion Architecture (Bronze / Silver / Gold)** — established clean data quality gates supporting both operational and analytical consumers.



**Lakehouse Re-architecture** — replaced brittle SSIS jobs with scalable, maintainable Databricks pipelines on Azure using a modern lakehouse pattern.



**SSIS Workflow Migration** — all workflows refactored into modular, well-tested Databricks notebooks preserving business logic while eliminating fragility.



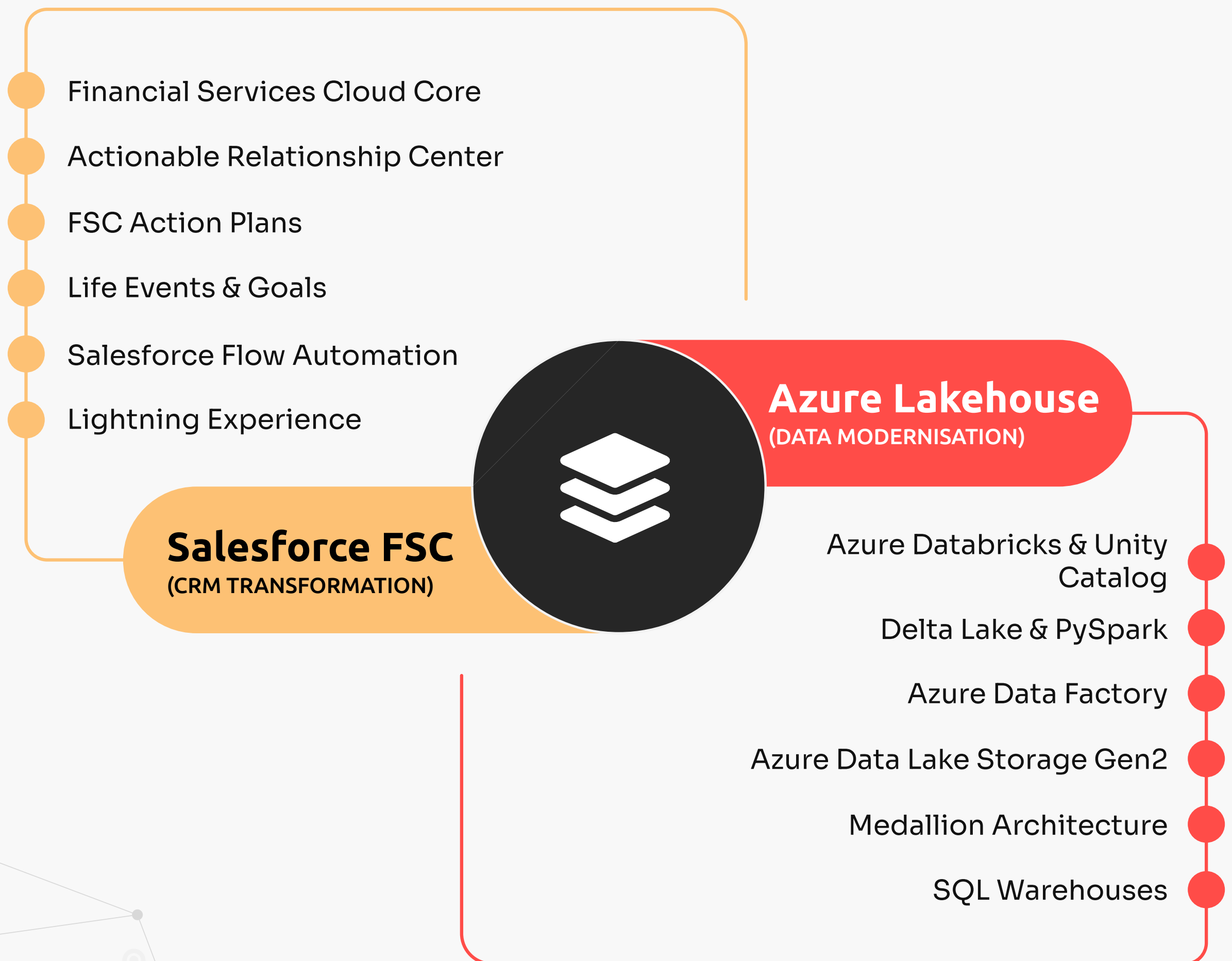
**Orchestration & Governance** — Azure Data Factory, Unity Catalog, Azure Key Vault, and Azure Monitor for enterprise-grade control.



# Technology Stack

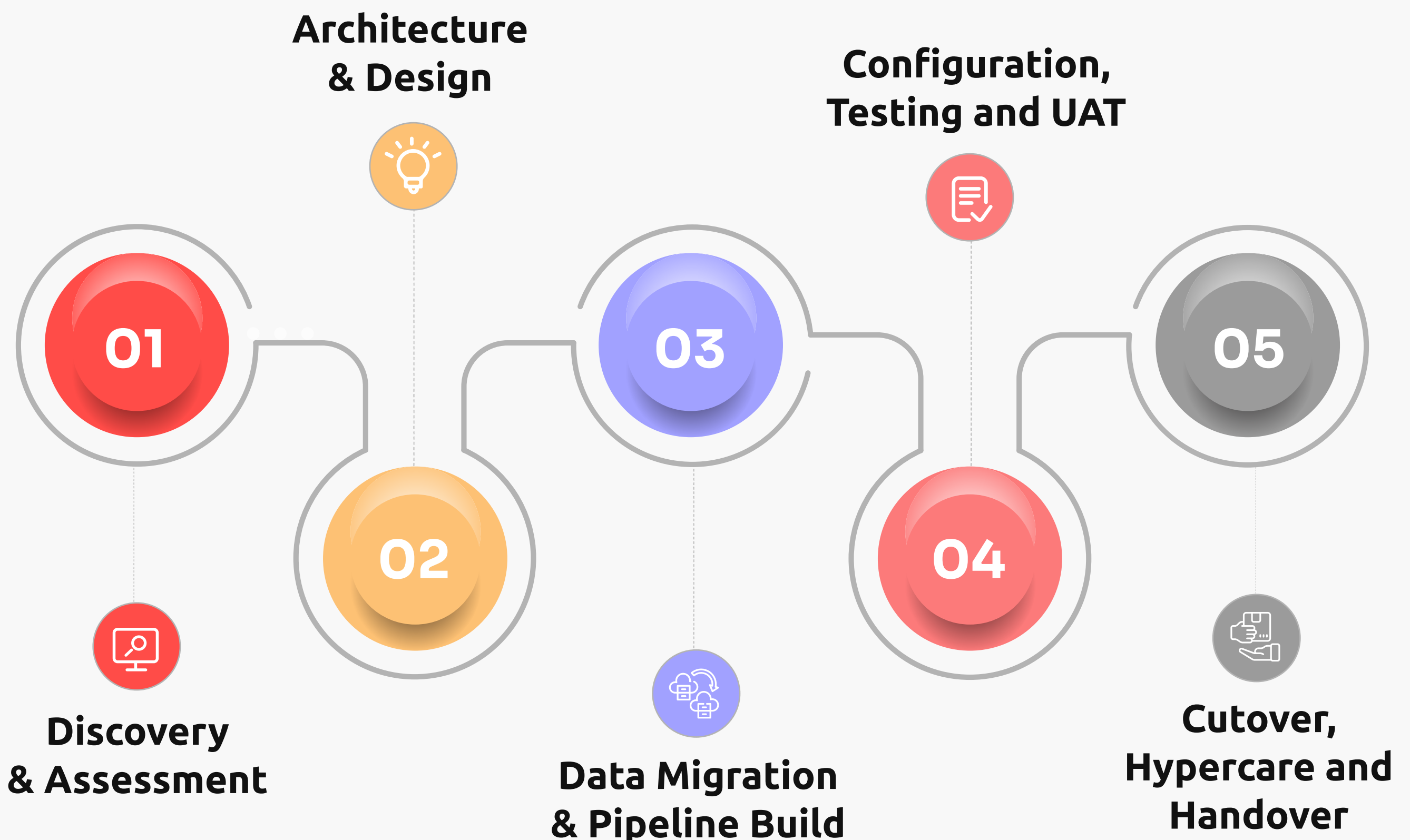
Three non-negotiable principles:

Cloud-native by design | Minimal long-term maintenance |  
AI-ready without architectural rework



# Delivery Process

Both workstreams followed a phased, parallel delivery model, structured to minimize business disruption while maintaining momentum across two major transformation programs simultaneously. A unified governance layer ensured dependencies between the CRM and data work streams were actively managed rather than discovered late.



## Target Impact



**360°**

Unified client view delivered to every advisor



**~70%**

Reduction in pipeline processing time



**0**

Silent pipeline failures post go-live



**100%**

Custom Apex replaced by native FSC features



**Improved Efficiency**

Data engineering team able to focus on value creation rather than maintenance.



**AI-ready**

Lakehouse architecture supports ML workloads

“ The organization moved from two legacy systems that constrained every strategic ambition, to a modern, integrated platform that actively accelerates them. ”

**01** Advisors now operate from a single, trusted source of truth

**02** AI and ML are now an achievable next step, not a distant aspiration







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