ADAM + Salesforce for Asset & Wealth Management

Agentic AI for Advisor-Led Growth, Trust, and Scale

brillio

Asset and wealth management firms are navigating a period of structural change. Client expectations for personalization, transparency, and responsiveness are rising, while advisory models, product portfolios, and regulatory obligations continue to grow in complexity. Advisors are expected to manage deeper relationships across households, deliver timely and relevant guidance, and expand wallet share, all while operating within strict governance and compliance frameworks.

Brillio's ADAM enables asset and wealth managers to operationalize agentic AI across the full advisory and revenue lifecycle. Rather than introducing disconnected AI tools, ADAM orchestrates intelligent agents that work together to support advisors, sales leaders, and operations teams, driving growth, efficiency, and trust at scale.

Scaling Personalization Without Losing Control

In many asset and wealth management organizations, core activities such as prospecting, onboarding, opportunity progression, pricing, renewals, and servicing are fragmented across systems and teams. Advisors lack a unified, real-time view of client and household interactions. Leadership teams struggle to assess pipeline health and forecast outcomes with confidence. Operations teams manage manual handoffs, inconsistent approval processes, and limited visibility across the end-to-end journey.

While AI is increasingly adopted to address these gaps, most initiatives remain isolated, applied to individual tasks rather than orchestrated across the business. Without coordination, governance, and domain context, AI delivers limited impact and erodes trust.

Asset and wealth managers need an approach that embeds intelligence directly into Salesforce-driven workflows, aligning advisors, operations, and leadership around a shared, governed system of action.

ADAM: Powering Growth in Asset & Wealth Management

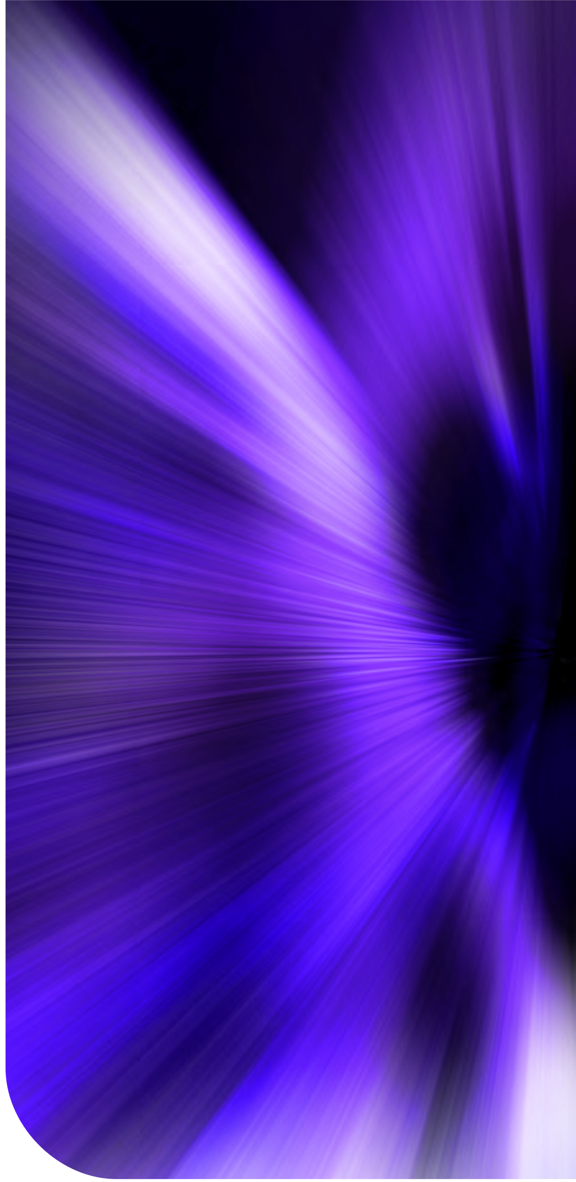
ADAM is Brillio's composable and extensible agentic platform, designed to help enterprises adopt, scale, and govern AI with confidence. Tech- and tool-agnostic by design, ADAM combines a structured strategy toolkit with a robust platform foundation, accelerating the design, deployment, and scaling of agentic solutions across complex business environments.

For asset and wealth management firms, ADAM provides:

- A value-driven roadmap for adopting agentic AI aligned to advisory and growth priorities
- Reusable building blocks that accelerate time-to-value
- Enterprise-grade safety, scalability, and control
- Seamless integration with Salesforce and surrounding ecosystems

ADAM enables innovation without compromise, ensuring AI-driven growth remains explainable, auditable, and compliant.

ADAM on Salesforce:
An Agentic Operating Layer for AWM



When combined with Salesforce, ADAM becomes an agentic operating layer that supports the full asset and wealth management lifecycle, from initial engagement through long-term relationship expansion and retention.

At the core of this approach is the ADAM Agent Library, a curated set of intelligent agents that automate, orchestrate, and optimize Salesforce-centric processes while remaining aligned to AWM-specific business rules and governance models.

L2O / CRM Agent (Lead-to-Opportunity)

The L2O / CRM Agent supports the earliest stages of client engagement. It captures leads across channels, enriches them with contextual and intent signals, and validates data quality to ensure advisors start with accurate, usable information. Through lead scoring and intent detection, the agent helps prioritize high-potential prospects and routes opportunities to the right advisors based on territory, expertise, and account context. It also supports account and opportunity creation, ensuring a consistent foundation for downstream advisory activities.

CPQ Agent

The CPQ Agent enables advisors and sales teams to navigate complex product portfolios with greater speed and control. It supports product selection, SKU validation, margin validation, and price book management, while applying pricing and discount rules consistently. By orchestrating quote generation and bundling recommendations, the agent helps balance client suitability, commercial objectives, and governance requirements within Salesforce.

Q2O Agent

The Q2O Agent manages the transition from approved quote to executable order. It supports contract management through autonomous template generation, SLA tracking, approval workflows, version archiving, and signature dispatch. Once approved, the agent facilitates order management by validating SKUs, converting quotes to orders, and triggering fulfillment activities, ensuring continuity and auditability across the handoff from advisory to execution.

Billing & Invoicing Agent

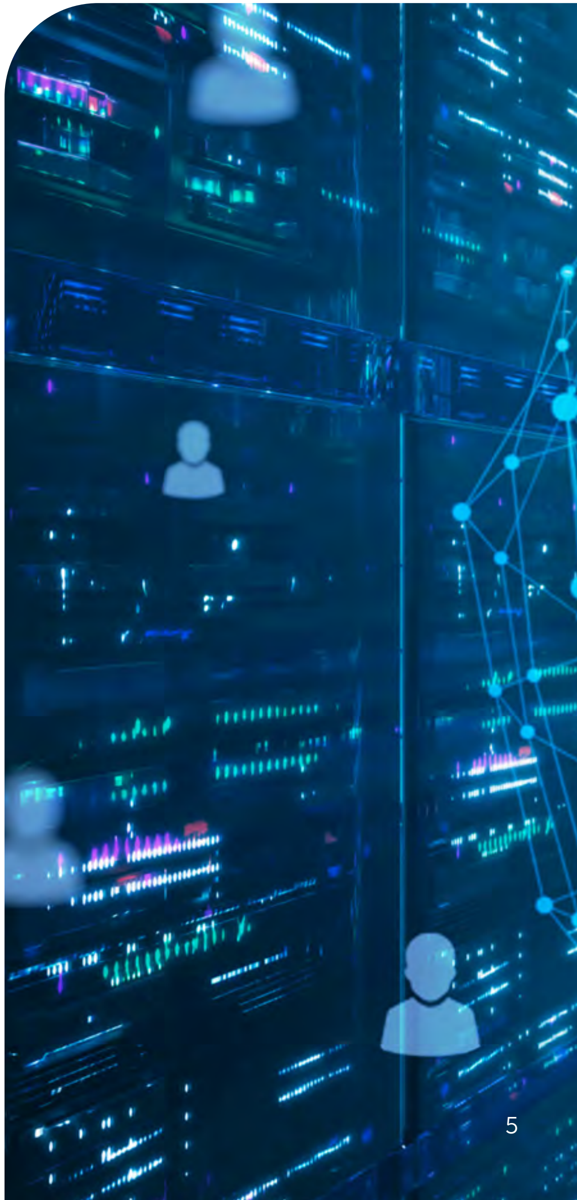
The Billing & Invoicing Agent automates downstream financial operations while maintaining accuracy and compliance. It supports autonomous invoice generation, tax rule validation, payment processing, and credit note handling. Integrated with gateway systems and financial platforms, the agent improves processing speed and reduces manual intervention, while preserving transparency across billing and invoicing activities.

Renewals & Expansion Agent

The Renewals & Expansion Agent focuses on long-term relationship growth. It tracks renewals, creates renewal opportunities, and generates renewal quotes directly within Salesforce. Through cross-sell and up-sell recommendations, account health scoring, and churn detection, the agent enables advisors to proactively strengthen relationships, expand assets under management, and reduce attrition among high-value clients.

Deal Desk Agent

The Deal Desk Agent enforces pricing governance and deal integrity across complex, non-standard scenarios. It supports discount exception handling, routing workflows, SLA monitoring, benchmarking, and leakage detection. By reviewing non-standard terms, validating clauses, and orchestrating cross-functional approvals, the agent helps organizations maintain consistency, compliance, and financial discipline without slowing advisor execution.



Cash & Collections Agent

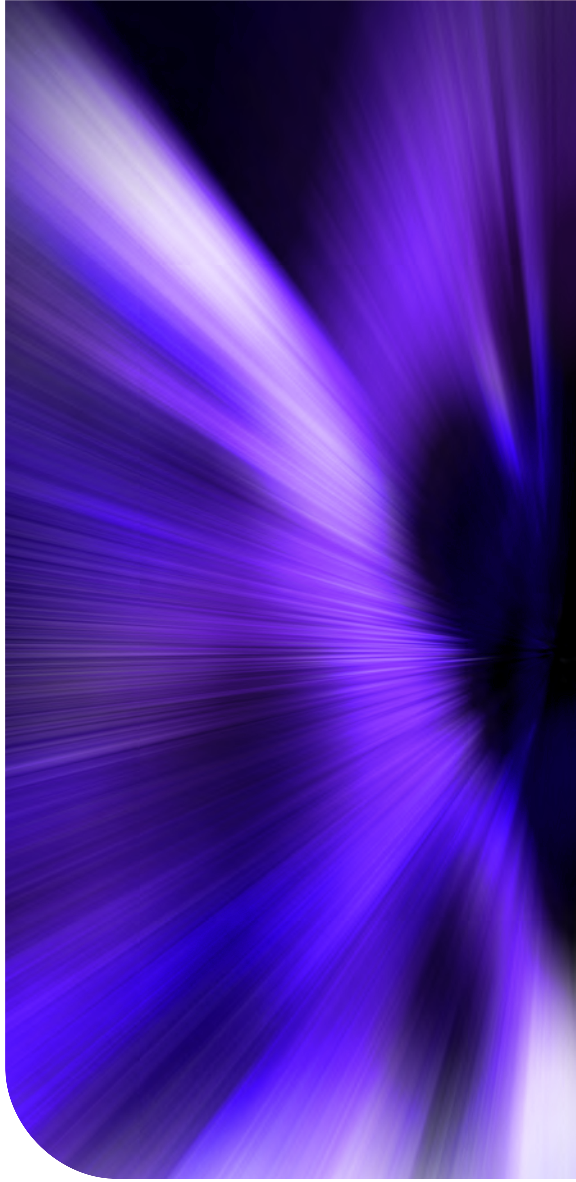
The Cash & Collections Agent supports post-sale financial governance and revenue realization. It manages payment collection, tracks outstanding balances, suggests payment plans, and orchestrates escalation workflows when delays occur. The agent also supports revenue recognition activities, including invoice validation and multi-currency handling, ensuring financial accuracy and control across the back end of the advisory lifecycle.

High-Value AI Use Cases for Asset & Wealth Management on Salesforce

ADAM brings high-value AI use cases to life across Salesforce by embedding intelligence directly into the systems advisors and sales teams use every day. These capabilities span lead management, account and opportunity management, and downstream revenue effectiveness, ensuring insight translates into action.

Intelligent Lead Management

ADAM enables predictive lead scoring based on firmographics, engagement signals, and historical conversion patterns, helping teams prioritize high-intent prospects early in the lifecycle. AI-powered lead qualification and routing apply intent signals, territory alignment, and persona matching to ensure opportunities are directed to the right advisors. Natural language processing extracts structured metadata from emails and web forms, while third-party intent data strengthens demand detection and demand generation efforts.



Account & Opportunity Intelligence

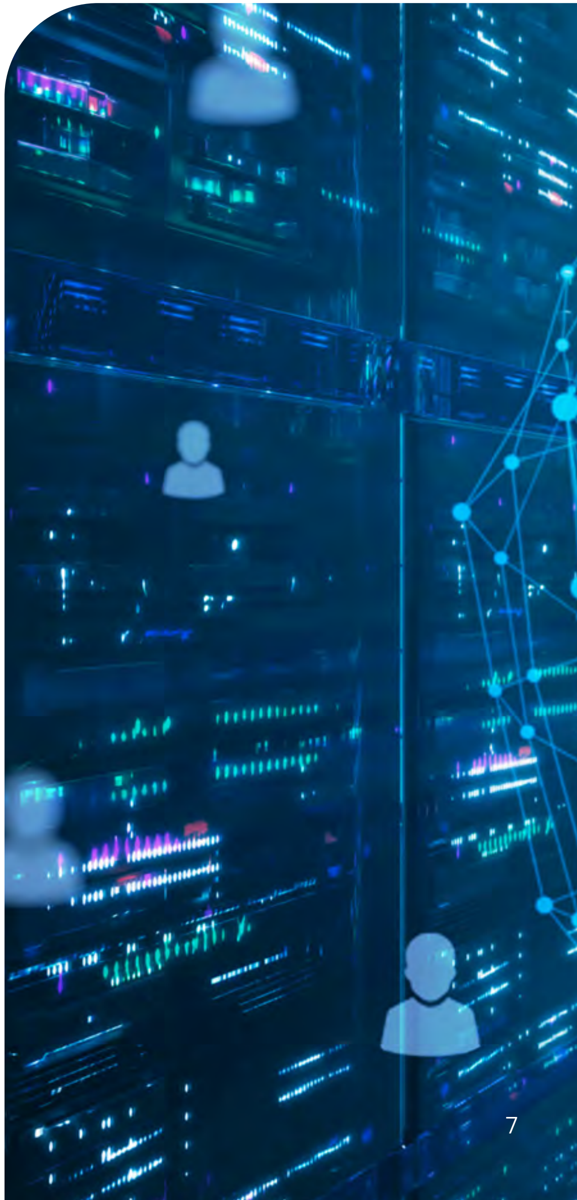
Within Salesforce, ADAM supports account onboarding and opportunity progression through continuous intelligence. Account intent analysis leverages external data sources to identify buying signals, while win probability prediction models assess the likelihood of success at each stage. Opportunity health scoring evaluates deal momentum using indicators such as stage progression, communications, sentiment, and opportunity age. Cross-sell

Business Impact That Scales with the Organization

ADAM and Salesforce provide asset and wealth management firms with a practical, extensible foundation to operationalize agentic AI across advisory, revenue, and operational functions.

Whether the objective is to empower advisors, scale personalization, improve governance, or drive sustainable growth, ADAM helps transform AI ambition into measurable business outcomes, without sacrificing trust or control.

- **40-60%** faster lead qualification time
- **15-25%** increase in lead-to-opportunity conversion
- **10-20%** increase in win rates
- **Up to 40%** reduction in sales cycle time



ABOUT BRILLIO

Brillio is a digital technology services company that drives AI-first engineering and design-led experiences for global enterprises. Born digital in 2014, its consulting-led services span Customer Experience, Data & AI, Product Engineering, and Digital Infrastructure. With an industry-leading NPS of 71, Brillio accelerates time to market through its proprietary BrillioOne.ai platform, powered by AI-ready talent with deep domain expertise. Brillio is the official Digital Transformation Partner and the official Data and AI Services Provider of Atlassian Williams Racing. Brillio partners with leading technology providers including Microsoft, AWS, Google Cloud, Salesforce, Adobe, Databricks, and Snowflake and operates with 6,000+ "Brillians" across 15 global delivery centers. Consistently recognized as a Great Place to Work® since 2021, Brillio blends innovation, talent, and purpose to deliver measurable outcomes for clients and fulfilling careers for employees.

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