

# Salesforce-ServiceNow Interoperability for Asset & Wealth Management

Building a Unified AI Operating Model Across  
Client, Service, and Operations

**brillio**





# Asset & Wealth Management in the Age of AI

Asset and wealth management firms are operating in an environment defined by rising client expectations, increasing regulatory scrutiny, and growing operational complexity. Advisors, service teams, and operations functions are expected to deliver faster, more personalized, and more transparent experiences, often across highly fragmented technology landscapes.

Platforms like Salesforce and ServiceNow sit at the center of this ecosystem.

Salesforce powers advisor workflows, client engagement, and omnichannel case management. ServiceNow underpins service operations, incident management, and enterprise workflow automation. Increasingly, both platforms embed AI capabilities through Salesforce Agentforce, ServiceNow Now Assist, and custom OpenAI-based agents, to improve productivity and decision-making.

Yet as AI adoption accelerates, many firms are discovering a new constraint. Intelligence is improving within individual platforms, but enterprise value remains limited when those platforms - and the AI agents within them - operate in isolation. To truly scale AI across the organization, asset and wealth managers must move beyond platform-level intelligence toward a unified, interoperable AI operating model.

# The Enterprise Reality: Fragmentation Limits AI Impact

In most asset and wealth management environments, Salesforce and ServiceNow are already deeply embedded across front, middle, and back-office functions. Advisors rely on Salesforce to manage client relationships, service requests, and communications. Operations and technology teams depend on ServiceNow to resolve incidents, manage change, and orchestrate enterprise workflows.

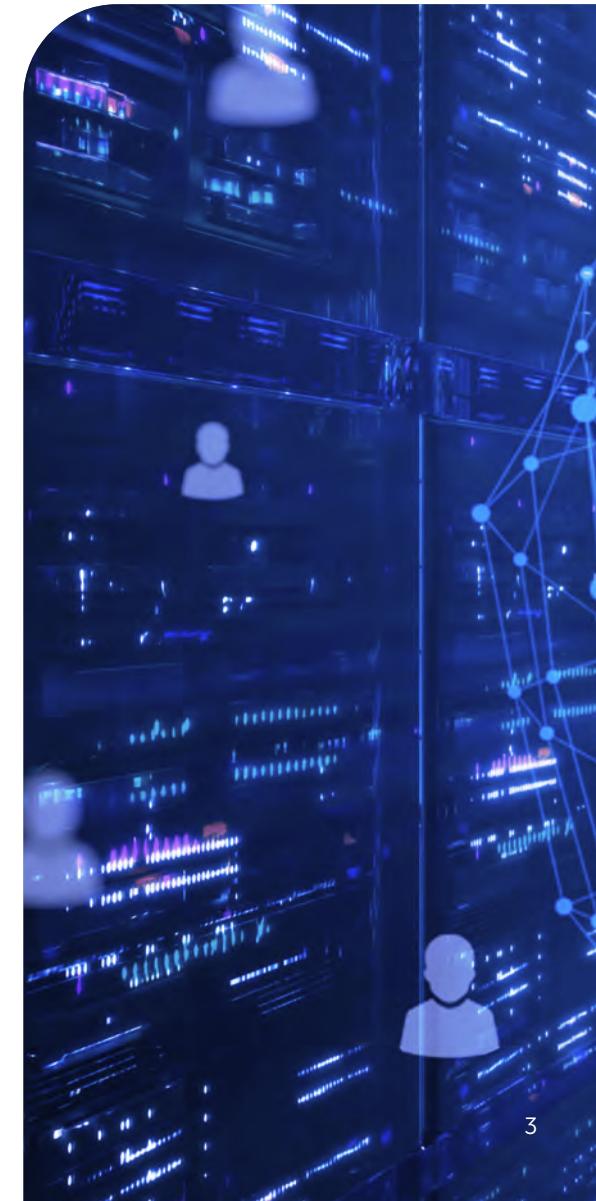
At the same time, AI capabilities are being introduced across both platforms. Salesforce Agentforce supports case routing, advisor assistance, and customer insights. ServiceNow Now Assist accelerates service desk productivity and incident resolution. In parallel, custom OpenAI agents are often deployed for call summarization, sentiment analysis, and intent detection.

Without a unifying orchestration strategy, these initiatives evolve independently. AI-driven workflows stop at platform boundaries. Context generated in one system is not available in another. Advisors lack full visibility into downstream service issues, while operations teams lack real-time awareness of client impact.

For asset and wealth managers, this fragmentation carries risks:

- Delayed responses to high-value client issues
- Inconsistent servicing experiences across channels
- Manual hand-offs between advisory and operations teams
- Increased compliance exposure due to incomplete context

Instead of adding value, AI investments remain siloed, limiting their impact on advisor productivity, service quality, and operational resilience.



# The Core Challenge: From Platform AI to Enterprise AI

The fundamental challenge facing asset and wealth management firms is not access to AI capability, but the lack of a unified AI-powered architecture and operating model.

To unlock enterprise-wide value, AI must function across systems, not within them. Salesforce must serve as the primary experience and orchestration layer for advisors and client-facing teams, while federated AI agents across Salesforce, ServiceNow, and OpenAI collaborate behind the scenes. Data, workflows, and intelligence need to flow seamlessly across platforms, without introducing unnecessary duplication or security risk.

This requires clarity on three fronts:

- How AI agents across Salesforce, ServiceNow, and OpenAI interact to deliver measurable business outcomes
- How data is harmonized and exchanged to support platform-agnostic AI workflows
- How organizations transition from today's fragmented state to a scalable, governed, and interoperable AI ecosystem

Solving this challenge is not about consolidating platforms or replacing existing investments. It is about enabling each system to operate at its best while participating in a shared, end-to-end AI operating model tailored to the realities of asset and wealth management.

# Laying the Foundation: Establishing Connected Operations

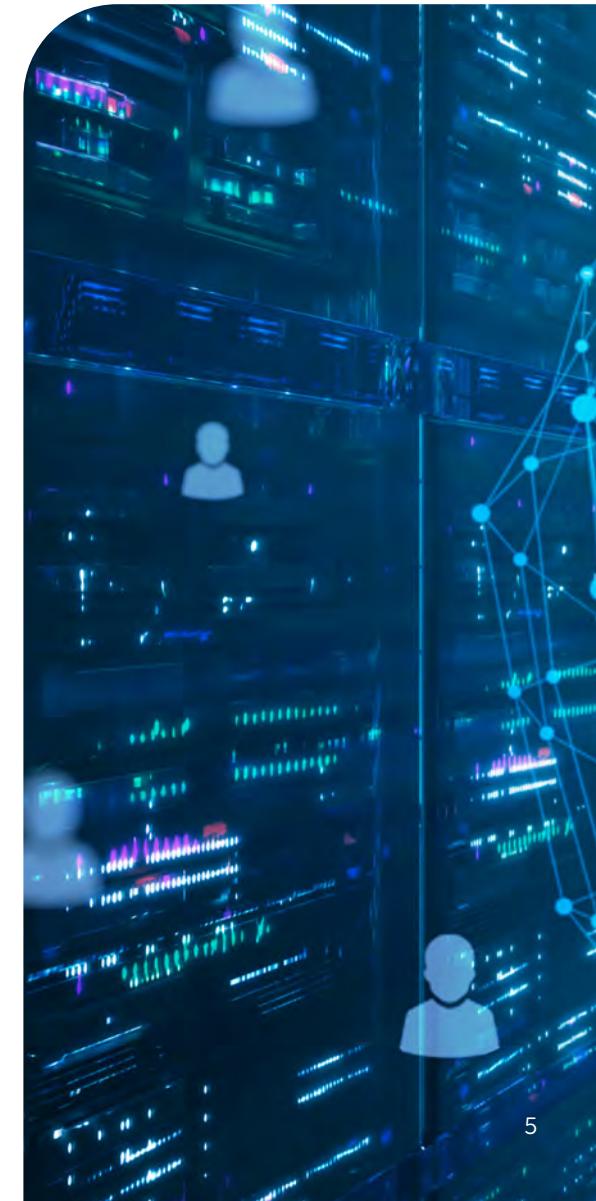
The foundation state focuses on enabling connectivity and visibility across Salesforce, ServiceNow, and adjacent systems without disrupting existing workflows.

At this stage, Salesforce and ServiceNow remain distinct systems of execution. Advisors continue to work within Salesforce Service Cloud, while service and operations teams operate within ServiceNow. API-led integrations enable secure data exchange, allowing key case, incident, and service information to be shared across platforms.

AI capabilities are introduced locally, where they deliver immediate value. OpenAI-powered summarization, sentiment analysis, and intent detection enhance advisor and service desk productivity. Salesforce Agentforce provides in-context assistance to advisors, while ServiceNow Now Assist accelerates incident handling and service requests. This foundation delivers:

- Single-screen visibility for advisors into service incidents
- Faster triage and prioritization of client-impacting issues
- Reduced system switching for service and operations teams
- Improved service continuity during high-touch interactions

Crucially, this phase establishes trust, data quality, and adoption, setting the stage for more advanced AI orchestration.



# Enabling Federated Intelligence: The Interim State

As firms mature their AI strategy, the interim state introduces federated intelligence across platforms.

Salesforce Data Cloud and MuleSoft act as the connective tissue, enabling cross-platform data ingestion, harmonization, and event-driven integration. Unified customer and service data becomes accessible to AI agents across Salesforce and ServiceNow, without centralizing sensitive data unnecessarily.

Agentforce and Now Assist begin to collaborate. AI-generated summaries, insights, and intent signals are shared across systems, enabling coordinated decision-making. OpenAI-driven triage supports dynamic prioritization and routing of cases based on client impact, sentiment, and urgency. This enables:

- Advisors to engage clients with full awareness of operational issues
- Service teams to prioritize cases based on relationship value and impact
- Faster root-cause identification across client, service, and network domains
- Reduced reactive workload through early detection and intervention

AI evolves from isolated productivity tools into a shared intelligence layer supporting both client-facing and operational teams.

# The End State: Unified AI Orchestration Across the Enterprise

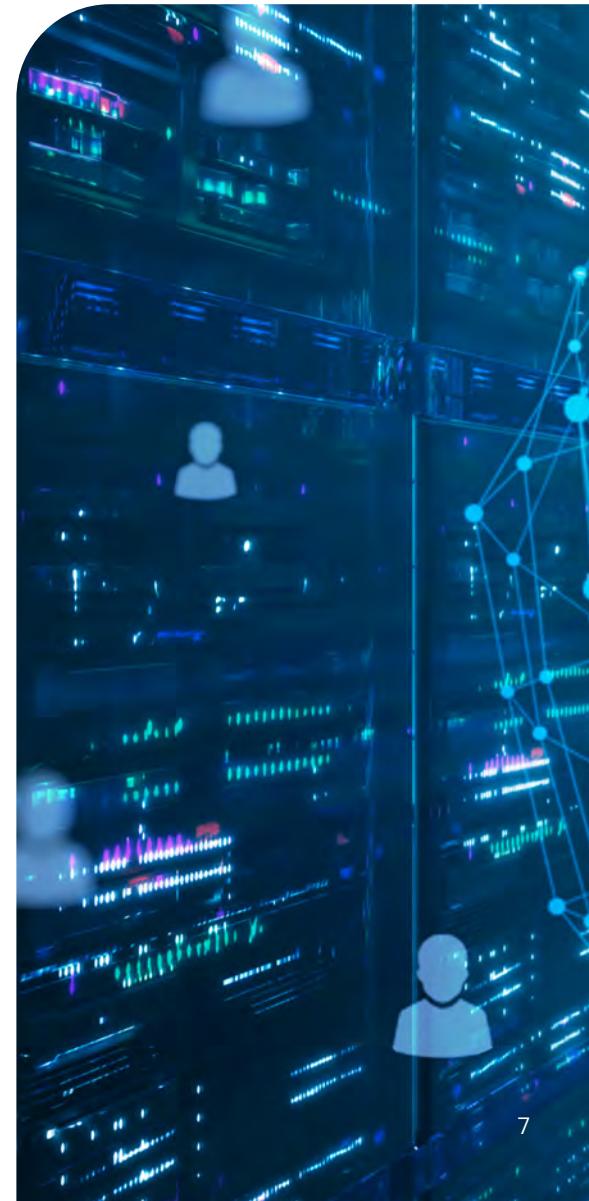
The end state represents a fully unified AI operating model, purpose-built for scale, governance, and measurable outcomes.

Salesforce Agentforce becomes the orchestration layer – the “glass” through which advisors and service teams engage. A centralized AI Agent Registry enables federated collaboration across Salesforce, ServiceNow, and OpenAI agents. Guardrails, instructions, knowledge, and actions are governed centrally to ensure compliance, transparency, and traceability.

MuleSoft and Data Cloud underpin seamless data exchange, orchestration, and event routing. AI agents dynamically assign actions based on intent, priority, and business rules while respecting platform ownership and security boundaries.

This delivers a true unified AI fabric:

- Advisors supported by real-time, cross-domain intelligence
- Automated closed-loop workflows spanning client, service, and operations
- Built-in compliance, auditability, and SLA assurance
- Measurable improvements in resolution speed, satisfaction, and productivity



# Use Cases for Asset & Wealth Management

## Advisor & Client Experience

Unified AI agents generate concise case summaries, surface 360-degree client insights, and provide real-time advisor assistance. Personalized, compliant communications are drafted automatically, accelerating response cycles while preserving tone and regulatory alignment.

## Operational Efficiency

Proactive case creation, intelligent triage, and cross-system orchestration reduce manual effort and eliminate hand-off delays. Data hygiene and enrichment agents continuously improve data quality, strengthening downstream analytics and automation.

## Risk & Compliance Intelligence

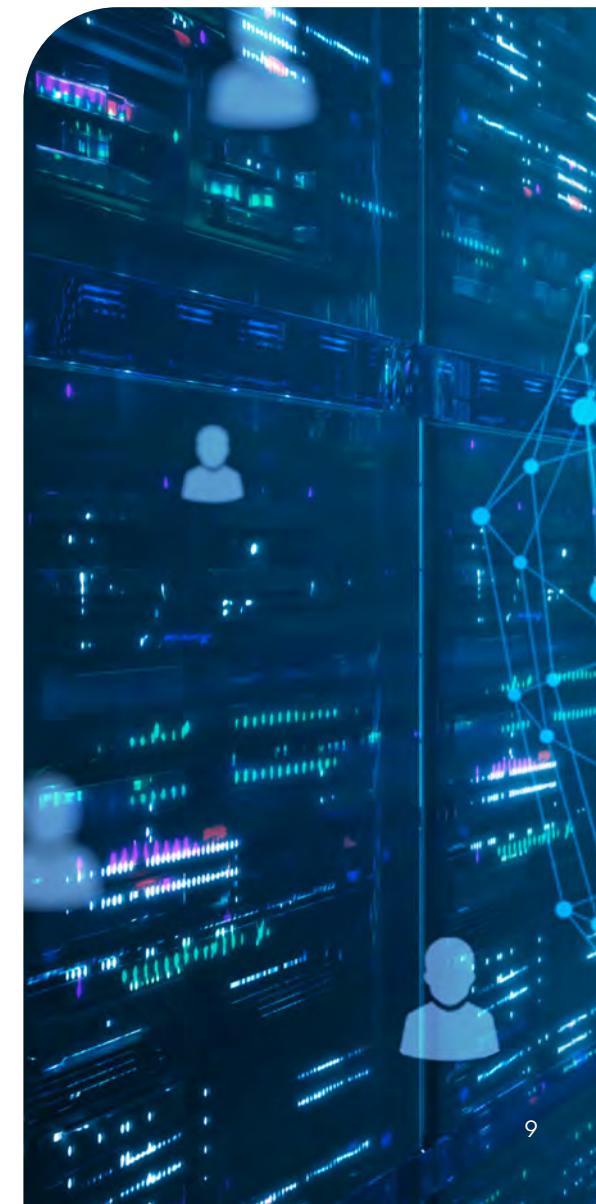
AI-powered policy and compliance assistants deliver contextual, reference-backed guidance. Next-best-action recommendations combine behavioral, transactional, and service insights to drive retention, revenue growth, and risk mitigation.

# Why Brillio?

Brillio brings deep expertise across Salesforce, ServiceNow, and enterprise integration, combined with a pragmatic understanding of AI operating models in regulated environments.

For asset and wealth management firms, Brillio helps move beyond isolated AI initiatives to scalable, interoperable, and governed AI ecosystems, designed to support advisors, operations, and risk teams simultaneously.

By aligning architecture, data, workflows, and AI under a unified operating model, Brillio enables firms to realize the full potential of AI securely, responsibly, and at scale.



# 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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