Deloitte.

Accelerating compliance, agility and efficiency with modern cloud innovation

A global wealth management firm worked with Deloitte to rebuild its cloud platform and operating model accelerating innovation, efficiency, and regulatory compliance at scale.

In today's fast-paced financial world, even leading global investment banking firms continually evolve to remain competitive. For one global wealth management firm, the challenge was to optimize operational efficiency and maintain compliance with evolving regulations—while continuing to deliver exceptional client experiences.

Legacy systems, though reliable, limited the agility and innovation needed to stay ahead.

The firm recognized the need for a robust digital transformation strategy, leveraging modern cloud technologies to streamline processes and future-proof its business.

The organization's legacy technology infrastructure restricted its ability to innovate, scale efficiently, and deliver seamless client experiences. Managing risk, security, and regulatory requirements across outdated systems led to operational bottlenecks and increased costs.

Deloitte was engaged to design and implement a comprehensive cloud transformation strategy.

What happened next

Deloitte's professionals, combining deep engineering talent with business insight, worked with the client to develop a comprehensive digital transformation roadmap. The client selected the Microsoft Azure platform to enable cloud adoption, automation, and advanced analytics.

To achieve the firm's digital transformation goals—operational excellence, regulatory compliance, and enhanced customer experience—Deloitte organized efforts into three workstreams: enablement, engineering, and adoption.

- **Enablement:** Deloitte helped transform IT infrastructure for scalable, secure cloud foundations and robust data management. A Cloud Business Office (CBO) was established to govern cloud initiatives, ensuring efficiency, cost-effectiveness, and security.

- **Engineering:** Deloitte's engineers codified and automated processes, and security and compliance were embedded by design.

- **Adoption:** The focus was on migrating developer teams to the new platform and maximizing its value. The client was able to leverage business intelligence, while improved onboarding processes enabled teams to adopt new ways of working.

The result: a modern, self-service cloud platform that enables internal developers to focus on business value, while supporting compliance and security at every step.

Cloud-Powered Compliance and Agility, Delivered at Scale
The first phase of the project was completed in 2024, delivering a new cloud platform that empowered early adopter application development teams to achieve greater speed and clarity through standardized intake processes, streamlined onboarding, and measurable success metrics. Migration from legacy environments enabled the organization to realize greater business agility, increased innovation, improved security and compliance, and reduced costs.

The wins

Deloitte launched a modern, scalable cloud platform that accelerated cloud adoption and reduced onboarding time from months to days, achieving the following outcomes:

- ☑ **Operational Efficiency:** 97% reduction in application deployment time, 90% reduction in onboarding time, and 91% fewer manual cloud tickets—enabling teams to focus on innovation.

- ☑ **Cost Optimization:** Over $3 million saved through cloud cost management.

- ☑ **Compliance:** Enhanced compliance with embedded controls and advanced analytics.

- ☑ **Customer Experience:** Improved satisfaction through faster, more reliable service.

With Deloitte's help, the firm has accelerated cloud adoption while maintaining strict compliance and security standards. End-to-end automation has freed up resources and positioned the firm for continued growth and innovation.

Building on this foundation, the organization plans to extend automation into back-office operations, leverage advanced analytics for smarter decision-making, and explore scalable solutions to support ongoing growth.

By the numbers

97% reduction

in application deployment time.

91% decrease

in manual cloud tickets.

$3M+ in cost savings

through cloud cost optimization.

90% reduction

in intake and onboarding time.

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