

# Use Case: Managing Lead Flow In Money Services Businesses

## **MSBs save time and effort by bulk loading leads sourced from Orbis directly into Salesforce**

Money Services Businesses (MSBs) - including foreign exchange and payments companies - often bring in a high volume of leads and have a large number of salespeople. As a result, they can find it challenging to bring enough information into their Salesforce lead management environment and assign it to the right people. Manual processes and high volumes can cause numerous issues in the sales cycle, including a problem of duplicate entries in their CRM.

Such duplicates can be costly. For example, we helped a client discover that a £2 million sale was at risk because of duplicates in their CRM. In that case, two salespeople prospected the same company and quoted different prices, which meant they nearly lost the sale to a competitor.

### **Challenges faced by MSBs include:**

- Duplication of records in the system leads to time lost as salespeople try to figure out which record is correct and/or multiple sales reps sell to the same prospects.
- Manual lead management for a high volume of leads means sales reps don't get lead information fast enough for effective prospecting.
- Inaccurate or out-of-date firmographic data makes it difficult for sales reps source the correct contact information and prioritize which prospects to sell to first.

### How Moody's Orbis for Salesforce can help:

- Our integrated application means that leads can be sourced directly from Orbis and imported into Salesforce in bulk. This not only reduces the time taken to source relevant leads, but also removes manual effort from the process.
- Importing necessary information directly from our award-winning Orbis database will mean Salesforce is populated with actionable information to segment leads and accounts effectively. This will help the sales team optimize their time and sell to the right companies.
- Each record is assigned a unique ID number from Orbis, preventing duplication as the Moody's Orbis for Salesforce can identify if the record is already in Salesforce.
- With more complete information available on accounts in your database, Marketing can perform better analyses to segment and profile more effectively.

Contact us today to learn how Moody's can help with your Salesforce data integration.



## For more information, contact:

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