Aspen Wealth Strategies

Inspired Client Success

COMPANY OVERVIEW

The team at Aspen Wealth Strategies wants to make a difference in each client's life for the better; that's why our mission is to deliver innovative strategies to inspire great living. Our goal is to always provide our clients with an exceptional experience. Our approach and process is designed to fit every client with tailored strategies. We believe that you are the most important part of our plan and we want you to be involved, so we make the process enjoyable and easily understood.

COMPANY PROFILE

Aspen Wealth Strategies

LOCATION	*Arvada, CO*
INDUSTRY	*Financial Services*
COMPETITOR	*Spreadsheets, Microsoft Dynamics*
SOLUTION(S)	*Sales Cloud*

CHALLENGE

Aspen Wealth uses a very customized process to help their clients with their financial plans. They developed a workbook to help their clients develop their goals and "Live their Best Retirement." Aspen needed the technology to securely store and access the information their clients were providing them. They were using word documents and spreadsheets, which were effective but very inefficient. In the financial services industry, information is critical. Their clients rely on them to deliver effective strategies, to insure that the advice they provide willl make a difference for their clients and their families.

SOLUTION

The solution Aspen was looking for needed to be highly customized and work with their current systems. They didn't want to completely reinvent their process. They knew it was making a difference for their clients, however they also realized they could not help more people because of the inefficiencies of their former system. MK Partners helped them create buttons and workflows and named them in the same terminology they were used to using. MK Partners created a fully customized way they could recall their client's important information and keep it secure. Their Salesforce org is up and running to insure they stay in close communication with their clients and keep them informed about their plan and investments.

VALUE/RESULTS

"We hired a new Director of Client Services in December. We were able to train her and get her up and running far sooner then we anticipated. She is a quick learner and very dedicated but the Contact Management System and information layout have made a tremendous difference in her job. She now has more time to spend collaborating with our team to make a difference for our clients. "

- Andy, President, Aspen Wealth

mkPartners

Testimonial for MK Partners

"I had a client meeting last week with a client that likes to be very informed about everything that is going on in their accounts. With the information in place I was able to recall and answer all of their questions effectively and without having to switch back and forth to three different systems. The client was pleased and that made our day. Every day when we come to the office we are amazed at what we can get accomplished and how much time we are saving by having Salesforce.

I would use this analogy to sum up our experience: Our old system was much like living in a 100 year old home. It has the charm and quality that people appreciate. Anyone that has ever lived in an old home exclaims they are always fixing something. That is exactly what our system felt like. Now with the help of MK Partners and Salesforce we have the charm and quality, and can spend more time on the mission of our company; *Delivering Innovative Strategies that Inspire Great Living."*

- Andy McClafin, President, Aspen Wealth

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