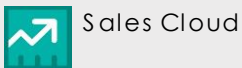




CASE STUDY: MOVING SALES FROM SPREADSHEETS TO AUTOMATION

Equi is an investment firm unlocking alternative investments for everyone—not just billionaires. Equi makes it safe and easy to invest in a custom, diversified and managed portfolio of private market investments. They are designing the investment portfolio of the future.

Clouds Utilized



Sales Cloud

Systems Replaced



Excel Spreadsheets

Implementation Timeline



8 weeks to go-live

“Equi has been very pleased with NuAge Experts. The team has high-level Salesforce understanding to implement everything we ever need, going above & beyond our expectations, and even suggesting improved use case scenarios to improve our underlying sales process.

Plus, we know we can trust the NuAge Experts team to get the job done right the first time. This is invaluable in our fast-paced startup environment”

MARSHALL HATFIELD

Head of Deal Sourcing, Equi

THE CHALLENGE

- Needed a digital CRM to manage its real estate leads and opportunities, to replace spreadsheets.
- Had siloed sales and client management systems, manual reporting, and undocumented processes, making it a challenge to collaborate, close deals, and support clients

NUAGE'S SOLUTION

- Implemented Sales Cloud to give Equi better insight and management of its incoming leads and opportunities.
- Customized and automated critical data capture fields inside Salesforce to eliminate time-consuming and error-prone data entry
- Created an automated and simple sales process to help Sales Reps follow up and close deals faster.

RESULTS + ONGOING INNOVATION



Equi's sales reps are saving 4+ hours each week in routine data entry.



Equi continues to leverage NuAge Experts for ongoing improvements to their Salesforce workflows to achieve better-systematized sales pipeline management.



Internal collaboration is faster and easier, and swarming a hot deal can now happen from anywhere.



Better process documentation is making the next phase—integrating its investment fund opportunities with its real estate records—a no-brainer.