

Customer Story: Mesirow Financial



Industry
Finance

Solutions
Sales Cloud, Chatter, Report Automation

Staff
800+ Employees

HQ Office
Chicago, Illinois

Mesirow Financial is a leading, independent financial services firm with expertise in investment, risk management, and advisory services. The company fosters a collaborative culture to develop tailored solutions to their clients.

Salesforce Challenges

Many of the challenges faced by Mesirow Financial was due to the company having multiple systems for various information types. As a result, the team found themselves unable to integrate vital customer data, making it inaccessible during critical sales points. This not only resulted in missed opportunities but also caused detrimental effects throughout their entire business. Mesirow Financial's reporting was confined to each individual system and took a great amount of time to consolidate, costing them valuable time that could be spent on growth opportunities. Additionally, all systems were manual, making sales processes long and cumbersome. Their current systems did not support effective communication and as a result, team members were missing out on critical updates and information. Finally, their existing system was unable to run campaigns on leads, there was no way to access the current services received by customers and overall growth was hindered.

Access Global Group Solutions

AGG began by integrating all customer data from their many systems into one, creating a single source of truth for advisors and preventing missed opportunities during sales calls. Additionally, our team worked to implement Chatter & Files for internal communication and file storage. In doing so, this eliminated critical gaps in communication throughout the team, allowing seamless collaboration with members and clients. Of paramount importance was creating a system that worked with Mesirow Financial rather than against them, thus, we curated custom system configurations, automated key work and approval processes and implemented campaigns for sales reps instead of relying on email blasts alone. Finally, automated reports and dashboards were configured to display real-time updates, so the Mesirow Financial team is seeing the most accurate information every time.

Salesforce Results

By utilizing the power of Salesforce, Mesirow Financial employees describe the effect on their business as "transformative." Reps are able to save substantial amounts of time due to all sales-related information being easily accessible and in one location. And because all vital client information is stored on one system instead of several, the sales team can quickly access previously sold services to take advantage of future upsell opportunities. Additionally, sales reps can track all emails sent from campaigns for added visibility into the customer journey. The entire sales process from initial meeting to close has been simplified and provides the executive team a comprehensive understanding into the sales team's strengths and needs. The Mesirow Financial team are now able to collaborate and share vital information with ease via Chatter capabilities and premier report automation ensures that the information being shared is not only transparent but accurate as well.