

Customer Story: Millennium Trust

Industry

Directed Custodianship

Solutions

Custom, DocuSign, Conga

Staff

300+ Employees

HQ Office

Chicago, Illinois

Millennium Trust was established in 2000 and focuses on unique IRA custody solutions. They are known for their ability to solve for the most complex IRA custody requirements.



Salesforce Challenges

- ⦿ Clients were not easily able to roll over their existing plans to Millennium Trust.
- ⦿ Current solution for partners to refer clients was slow and inefficient.
- ⦿ No secure way to share scanned copies of contracts.
- ⦿ There was no way to track progress of the partners or clients.

Access Global Group Solutions

- ⦿ Developed a custom portal as a Salesforce Site, includes login functionality for authorized partners only.
- ⦿ Portal also included several special features including auto population of partner information on agreements.
- ⦿ Ability to send clients a link where they can complete the required forms.
- ⦿ Ability to select custom negotiated agreements which are then sent using DocuSign.
- ⦿ Created a guest access mode for one-time clients to fill information and request services agreement using DocuSign.
- ⦿ Overall timeline tracking of process set up inside Salesforce by capturing data points and sending appropriate automated follow ups so the client process can be completed.

Salesforce Results

- ⦿ Partner experience has been greatly improved and has led to an increase in referrals.
- ⦿ Overall process is now transparent and has led to growth in numbers of completed contracts following referrals.
- ⦿ Guest access digital solution has improved the overall conversion of web leads into plan agreements.
- ⦿ The client service experience is now enhanced and greatly improved.