

Customer Story: Affinity Wealth Management

Industry

Wealth Management

Solutions

FSC, Pardot

Staff

50+ Employees

HQ Office

Wilmington, DL

Affinity Wealth Management is a full service, independent Wealth Management firm that has been serving successful individuals, families, and small businesses since 1974.



Salesforce Challenges

- ⦿ Affinity was unable to track customers' annual renewal dates.
- ⦿ They did not have the ability to track referrals.
- ⦿ They faced numerous obstacles communicating with customers.
- ⦿ They were unable to prospect through their current system.
- ⦿ They were unable integrate with Orion.
- ⦿ Did not have automations in place, making work processes time consuming.
- ⦿ Reporting was highly restricted.

Access Global Group Solutions

- ⦿ Implemented FSC
- ⦿ Implemented Pardot
- ⦿ Created and implemented custom components
- ⦿ Email integration

Salesforce Results

- ⦿ Affinity now has the ability to track renewals and referrals.
- ⦿ Communications have improved and are easily tracked.
- ⦿ Prospecting is automated through Pardot.
- ⦿ Now able to integrate with Orion.
- ⦿ All emails have the capability to be synced through email integration.
- ⦿ Intelligent automations were created to reduce manual work.
- ⦿ Overall manual work was reduced significantly by 40%.