Customer Story: Keen Wealth Advisors

Industry
Wealth Advisors

Solutions
Service Cloud, Sales Cloud

Staff
2,000+ Employees

HQ Office
Overland Park, Kansas

Keen Wealth Advisors is one of the top 5 financial advisors in Kansas who have successfully managed 500 Million worth of Assets. Keen Wealth is a Financial and Investment planning company specializing in Retirement and Estate Planning.

Salesforce Challenges

Because Keen Wealth Advisors' original consultant left before the project was completed, they felt the pressure of accomplishing the necessary changes to their system before their project deadline. With only a month remaining, Keen Wealth Advisors were still struggling with an incomplete picture of client profiles and they did not have the ability to track customers' annual renewal dates. Overall, communication with customers was inconsistent, making client retention a significant concern. Further, Salesforce's out-of-the-box lead conversion process was not a suitable fit for Keen Wealth Advisors to effectively use Financial Service Cloud. Finally, missing data became a problem as Keen Wealth Advisors were required to use Orion Connect to transfer financial data from the Orion system, but had no way of doing so. Access Global Group's intervention came at a critical juncture for the Keen Wealth Advisors team as we worked hard to finish the project within their desired timeframe.

Access Global Group Solutions

To address the series of challenges faced by Keen Wealth Advisors, Access Global Group implemented Salesforce solutions that aligned with the goals they wanted to achieve. This included customizing Sales and Service Cloud to help support agents with the many obstacles they were facing, including:

- Created custom lead conversion processes tailored to their specific needs rather than relying on the standard lead conversion process.
- Developed and implemented automation for time consuming and repetitive tasks to promote more efficient workflow.
- Assisted in data clean-up to ensure that the information they see is information they can trust.
- Created a workflow to migrate data from their sunset system, Tamarac CRM and Orion, to Salesforce – bringing all data to one platform to create a single source of truth for all vital customer information.

Salesforce Results

Keen Wealth Advisors saw a vital transformation in their workflows and overall efficiency. Agents are now able create cases through email IDs and are assigned to cases dynamically based on priority and agent profile. Further, agents have the ability to see multiple components of data on one screen, drastically decreasing the amount of time spent looking for the data needed to resolve a case. Access Global Group's unique blend of solutions enabled support managers to reassign agents to high traffic case queues with ease; further streamlining workflow and collaboration. Because we were able to significantly reduce and optimize manual work with automation, Keen Wealth Advisors' case resolution times now consistently meet KPIs.