

CASE STUDY

Financial Technology Sales Increase with Salesforce and HubSpot

Introduction



FMG Suite is a leading provider of marketing automation and lead generation solutions for financial advisors.

The company was looking to optimize its sales processes and streamline its customer relationship management (CRM) systems. To achieve this, FMG Suite hired **CloudROI**, a cloud consulting firm that specializes in optimizing Salesforce Sales Cloud and building out HubSpot integrations.



Problem

FMGsuite's sales processes were inefficient, and the company was struggling to keep up with customer demands.

The company was using Salesforce Sales Cloud as its primary CRM system, but the system was not fully optimized to meet its needs. FMGSuite was also using HubSpot for its marketing automation, but the system was not fully integrated with Salesforce Sales Cloud.

Solution



CloudROI worked closely with FMGSuite to optimize its Salesforce Sales Cloud system and build out its HubSpot integration. CloudROI's team of experts conducted a thorough assessment of FMGSuite's existing sales processes and identified areas that needed improvement.

After the assessment, CloudROI recommended a solution that would allow FMGSuite to optimize its Salesforce Sales Cloud system and integrate it with HubSpot. The solution included the following steps:

1

Salesforce Sales Cloud Optimization

2

HubSpot Integration

3

Customized Dashboards

4

Training and Support

Salesforce Sales Cloud Optimization

CloudROI optimized FMGSuite's Salesforce Sales Cloud system to meet the company's specific needs. This included configuring the system to track leads and opportunities more effectively, creating custom fields to capture important information, and setting up workflows to automate routine tasks.



HubSpot Integration

CloudROI integrated HubSpot with Salesforce Sales Cloud to provide a seamless experience for FMGSuite's sales team. The integration allowed FMGSuite to track leads and opportunities across both systems, ensuring that sales reps had access to all relevant information.



Customized Dashboards

CloudROI created customized dashboards for FMGSuite's sales team to provide real-time insights into their performance. The dashboards allowed sales reps to see their progress towards their goals and identify areas where they needed to focus their efforts.



Training and Support

CloudROI provided training and support to FMGSuite's sales team to ensure they were fully equipped to use the new system. The training covered how to use the optimized Salesforce Sales Cloud system and the HubSpot integration, as well as how to interpret the customized dashboards.



Results

The solution provided by CloudROI allowed FMGSuite to streamline its sales processes and improve its overall customer relationship management. The optimized Salesforce Sales Cloud system and HubSpot integration provided FMGSuite's sales team with a unified view of customer information, which helped them to identify opportunities and close deals more efficiently.

The customized dashboards provided by CloudROI allowed FMGSuite's sales team to track their progress towards their goals and identify areas where they needed to improve. The training and support provided by CloudROI ensured that FMGSuite's sales team was fully equipped to use the new system and maximize its benefits.



Conclusion

CloudROI's solution allowed FMGSuite to optimize its Salesforce Sales Cloud system and integrate it with HubSpot, providing a seamless experience for its sales team. The solution provided real-time insights into sales performance, allowing FMGSuite to identify opportunities and close deals more efficiently.

The training and support provided by CloudROI ensured that FMGSuite's sales team was fully equipped to use the new system and maximize its benefits. As a result, FMGSuite was able to improve its sales processes and overall customer relationship management.



Questions?



Contact Us



hello@cloudroi.com



(813) 451-5191



cloudroi.com