

Industry

Financial

Project Overview

Create a customer-oriented portal with improved user experience, designed to facilitate rapid exploration and expedite the evaluation process.

Project Developed

- Marketing Cloud
- Sales Cloud
- Heroku
- Experience Cloud

Time Frame

12 Weeks

Case Study***Transforming Client Onboarding for Higher Conversions*****The Challenge:**

Our client, a reputable M&A advisory firm, was facing a substantial roadblock in their quest to seamlessly onboard new clients. Their existing process involved a time-consuming manual approach, encompassing financial evaluations conducted via phone conversations and the utilization of Word Templates. Despite a steady influx of leads, the firm struggled with converting them into active clients within a reasonable timeframe. This was primarily attributed to a lengthy 60-day discovery period required for formal partnership initiation. Operating under this outdated model, the firm was managing a mere 15 new clients per month.

The Objective:

The main goal of this project was to revolutionize the firm's sales and onboarding processes, ultimately resulting in higher lead-to-client conversion rates. The secondary objective was to optimize resource allocation, allowing the team to dedicate more time to generating promising leads.

**The Auxano Solution:**

To address these challenges, the Auxano team proposed and executed a comprehensive solution. Leveraging the power of Salesforce, we introduced a modern, customer-centric approach to data entry and communication. This involved the development of a user-friendly client portal using Salesforce's Heroku platform. The portal aimed to simplify the process of submitting financial information and streamline communication between the firm and its clients.

Implementation:

The new client portal allowed clients to effortlessly input and upload their financial details, eliminating the need for time-consuming manual data entry. The submitted information seamlessly integrated into Salesforce, prefilling essential data points. This, in turn, expedited the client onboarding process, reducing the traditionally lengthy 60-day period to a fraction of the time.

The Results!

The outcomes of this transformation were nothing short of remarkable. The client saw a significant increase in lead-to-client conversion rates, as the streamlined onboarding process offered a more appealing experience to potential clients. By shifting from a manual entry approach to an automated portal, the firm was empowered to focus on lead generation, resulting in a notable uptick in potential leads.

**206%****INCREASE in
new clients
per month****400%****INCREASE in
business
enterprise
value****122%****DECREASE in
onboarding
time**