

Maximized the Salesforce Financial Services Cloud



Industry



A Corporate Fiduciary and Trust Company that manages assets and investments for group members and single-service entities (private funds and business revenue)

THE PROBLEM

The Coastline Trust Company provides unique life and financial management services that require deep knowledge of clients' lives & information.

Their old tracking system was dated and had fallen out of use amongst staff. The functionality of that tool was not meeting day-to-day business needs. They needed an upgrade - built for client communications and financial management.

OUR SOLUTION

StarrData was able to customize Salesforce and build an instance tailored to Coastline Trust's immediate business needs while ensuring the solutions would scale up with staff as the size of their team grows.

Now, staff can easily access consistent and centralized data so there is a singular view of projects, clients, and assets.

IMPROVED RESULTS

Now, Coastline Trust has a singular system with contacts migrated from outdated tools. Contacts are automatically segmented based on data criteria for unique communications that keep staff on track, clients notified, & relationships strong

- Clients are well-cared for with automated communications from the Coastline team, reducing random inquiries and improving customer relationships and brand trust.
- Staff activity can be easily tracked and attributed to the clients and deals they supported.
- Team members can be actively assigned to duties and tasks, and with simple integrations of daily tools, such as Outlook, all activity and communications with clients are automatically updated into their Salesforce system.
- Complex reports & analytics, such as the ability to track Household assets under their management.



Customer Quote

"We do everything for our clients: manage service and business staff, negotiate property leases, and grow their financial assets. It's important to manage all of that sensitive information within a CRM."

I realized pretty quickly that Salesforce is fairly complicated with a lot of tools and features. You need to have an expert in your corner who can take your vision and translate it into something powerful that helps you understand your data, your clients, and your business.

I think we're going to get to that vision of our future soon. That's only possible because of StarrData."



Rob Belmont - Chief Investment Officer at Coastline Trust



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