

ALTRUIST CLIENT SUCCESS STORY



Industry

Financial Services Software



Project Objective

Merge the Salesforce instances of Altruist Corp & Altruist Financial, migrate from ZenDesk to Salesforce Service Cloud, and automate the tracking of prospective advisors as they progress through sales stages.

BEFORE & AFTER

BEFORE: Altruist Corp and Altruist Financial had separate Salesforce instances and had a complicated tech stack using ZenDesk for support cases and HubSpot marketing hub.

Prospective advisors who entered Altruist's sales funnels were not tracked throughout every stage. Altruist wanted an automated system to track every stage prospects went through and their actions, ultimately providing them with important information and statistics to grow their business.

AFTER: StarrData merged the two Altruist Salesforce instances into one organized Salesforce instance with more efficient information.

StarrData simplified Altruist's tech stack, eliminating ZenDesk and HubSpot marketing hub and migrating all that critical information to Salesforce. Ultimately creating a more efficient CRM system within the Salesforce ecosystem.

Lastly, StarrData created an automated tracking system for Altruist's prospective clients, providing valuable information to inform and elevate their sales process.

RESULTS

Altruists #1 growth KPI grew 180% in the 12 months following the Salesforce funnel tracking updates StarrData designed

- Tripled assets under management in 2022 while growing revenue 1,700% year over year
- Average NPS score increased from 24 to 45 following deployment



Customer Quote

"We reached the point of company maturity where CRM was becoming pivotal to our growth and success. We knew Salesforce would be "home" and had a rough idea of what it needed so we could run frictionless processes and track KPIs. The challenge was not having internal, subject matter expert resources to design and implement the solutions we needed effectively. Enter StarrData."

"StarrData has helped us build our Salesforce instance into a powerhouse CRM, and we're not stopping there. Through the help of StarrData, we're committed to a future with Salesforce and have begun moving over to their service and telephony offerings so that all customer operations run in the same place. We continue to have aggressive requirements with tight timelines, yet StarrData and Salesforce continue to deliver. We're excited to continue our journey with both of them." - **Taylor Wilson, Director of Customer Relations, Altruist**