



M360 CUSTOMER SUCCESS STORY

 COMPANY
M360

 INDUSTRY
Investment Management

 OBJECTIVE
Customize, automate, and utilize Salesforce's capabilities for better event tracking, improved marketing, and superior client relationship management.

 WHY
M360 needs to be able to collaborate across teams with reliable insight into their investors and connected companies. This will allow for a more streamlined sales and marketing process.

TECHNOLOGIES & SERVICES USED



BEFORE

Prior to working with StarrData, M360 Advisors were experiencing difficulty utilizing Salesforce to track their investors, funds, and sales information.

Due to lack of training and Salesforce not being customized to meet their needs, the sales team and operations team had moved away from Salesforce and started tracking their data on individual Excel documents.

With the disparate data, reporting became limited, and M360 Advisors lost their ability to market meaningful content to their investors. They also had difficulty tracking the relationships and classifications of companies and individual investors.

AFTER

StarrData re-designed and implemented Salesforce for M360 Advisors, which allowed for robust marketing and sales relationship tracking, as well as sophisticated reporting to track investments and redemptions through regular updated investment information. StarrData has continued to support M360 Advisors through the administration of their Salesforce instance via the Managed Service.

The increase of visibility and insight into their data allowed the Sales and Marketing teams to work together to increase investment and shorten sales cycles.

Automation streamlines the overall process and their data is supported by monthly updates, providing insight into individual investments into the various funds.

RESULTS

- Increased visibility and insight into their data allows the Sales and Marketing teams to work efficiently to develop effective marketing campaigns
- Detailed automated data reporting streamlines the overall business processes and allows for M360 to apply the saved time to other aspects of business
- A re-designed and customized Salesforce allows for robust relationship planning, tracking, and managing of their investors and connected companies