

CASE STUDY

How a top finserv company enables sales during economic uncertainty

Learn how a top finserv company uses behavioral data and lead scoring to enable sales.

Presented by  **SALESWINGS**



With SalesWings, companies experience:

44%

higher open rates

2x

higher click-through rates

30%

increase in sales opportunities

Foreword

About the finserv company

They are a successful and respected financial services company based in North America.

Understand your customers

Understanding exactly what your clients want is important for businesses at all times, but it is especially important during an economic downturn. When the economy is struggling, businesses may be more vulnerable to financial challenges and may rely more heavily on their existing customer base to generate revenue. The key is to have better conversations with any prospects and current clients.

The challenge they were facing

Because of the economic downturn and uncertainty that accompanies it, the finserv company was faced with challenges. The finserv's clients' investments were down and this left them with hard questions. Clients were panicking about the future of their investments and the economy, but how could the finserv company identify these clients to proactively advise them?

The sales reps of this finserv company were also lacking any insights into hidden interests of their current clients. Without these insights, it was much more difficult for the finserv to cross sell. Lacking any form of tracking, the finserv's financial advisors were flying blind having no idea how and what content their clients were engaging with and/or interested in.



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Without SalesWings, it felt like we were flying blind. We weren't able to track who was coming to our site, what content they were looking at, and we didn't have any lead scoring.

How to foster better conversations

Using [website behavioral tracking and sales insights](#), your org will be able to deeply understand your prospects and current clients by being able to see interactions with your website and content in real-time. With these insights, your team can enter conversations already armed with the answers to the questions your prospects and clients are faced with.

Challenges

The finserv company recognized that they were lacking any native website tracking and [lead scoring for Salesforce Marketing Cloud](#) and Sales Cloud. Without sales insights, their reps had access to limited information when speaking on the phone with prospects and clients. Lacking any sort of lead scoring, their reps also lacked any ability to prioritize or properly nurture their leads.

The requirement for the tool they picked was that it integrated directly in Salesforce Sales Cloud. This would allow their sales and marketing teams to have direct access to the tracking insights and lead scores all within Sales Cloud.



Key Benefits

Since implementing SalesWings, the finserv firm has been able to:

- 1** Create unified profiles within SFMC gaining a centralized view of user data
- 2** Understand the customer timing and stage in the decision-making process
- 3** Calculate ROI of marketing campaigns using SalesWings' reporting
- 4** Increase sales readiness with rich sales insights funneled into Salesforce
- 5** Track interactions with key pieces of content using tagging
- 6** Internal activation with automated email alerts

Why SalesWings?

The finserv needed a solution that not only provided lead scoring and tagging, but also lead website tracking. With SalesWings, the finserv's financial advisors and sales reps knew exactly what content their clients and prospects were interested in making closing deals and cross selling all the easier. During an economic downturn, clients are sure to ask difficult questions, but with SalesWings' rich insights—this finserv's reps are ready.

With SalesWings, companies on average achieve 44% higher open rates and two times higher click-through rates with their email marketing campaigns. With SalesWings' behavioral insights and lead website tracking, marketers can create highly personalized, converting emails while sales reps can be armed with [the rich insights they need to close deals faster](#).



SW
Alex Chase 67 🔥

Viewed pricing page 💰

Strong buying signals 🚦

Page views:

www.your-website.com/	5x
www.your-website.com/pricing	3x
www.your-website.com/demo	1x

View Pricing »

Solution

With SalesWings, the finserv company is able to capture rich behavioral data, deliver timely sales alerts, and arm their sales reps and advisors with the insights they need. Using the rich data that SalesWings captures, the finserv company can foster better conversations and truly enable sales to their fullest potential. During an economic downturn, clients are sure to ask difficult questions, but with SalesWings' rich insights this finserv's reps were ready.

Conclusion

SalesWings offers your company the lead scoring, insights, and tagging you need to drive stronger sales conversations, hyper-personalized marketing efforts, and improve customer retention. [To learn more about what SalesWings can do for your company click here»](#)



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About SalesWings

SalesWings is a low-profile, innovative SaaS venture at the intersection of sales and marketing, operations and analytics. We are proudly headquartered in Switzerland and serve clients worldwide. We have a single goal—to make our clients successful.

SalesWings B2B Studio

SalesWings B2B Studio is an unstoppable lead management, website tracking, lead tagging & scoring solution for Marketing Cloud. We help our clients track 360° digital lead activity and provide a set of clever tools for lead intelligence, prioritization, insights, reporting, and more.

[Book demo](#)

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