Account Managers reach out 40% more active prospects with no additional effort!

About the company

Arconstech provides tools and technology platforms to manage traditional and alternative investments in the Financial services market. New features are rolled out every quarter; Some of the features are to enhance the client-services platform and some to bring new services to market.

The need

1. While rolling out a new feature set, often we would like to get a view of the potential impressions, i.e., how many customers can the new feature address?

2. We would like to get a view of the actual distribution, i.e., which of our clients got the information? Well-honed attention can be drawn the best from the customers at the time of the feature roll-out. Also, keeping people informed is pivotal to maintaining customer satisfaction.
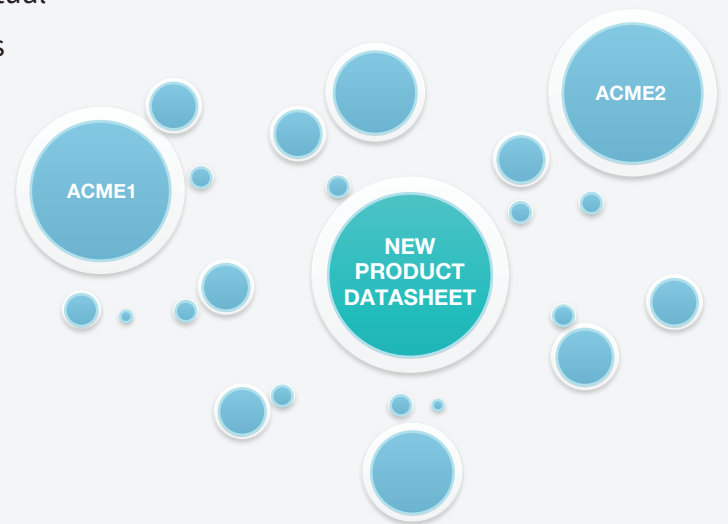
Current process

As an ongoing process:

1. Content distribution to account managers: Broadcast messages are sent out to account managers with new datasheets for customer delivery.

2. Sending the content to Customers: Automatic scripts are run on email database to generate the list of clients to send the document.

Challenge with the current approach

1. We don't have a real-time feedback mechanism to understand the potential reach of the new feature set before the roll out.

2. The present process of identifying and delivering content is time-consuming and erroneous. Accounts managers are focused on client engagements and often ignore the content alerts.

3. There is no visibility on the content distribution until emails are CC'ed and logged into Salesforce CRM or detailed account reviews.

Requirement

1. Do not desire a shift in our process, i.e.; our teams are reluctant to adopt new methodologies or new tools.

2. We extensively use Microsoft Office 365 applications: Outlook for Email, Skype for business and OneDrive for content distribution inside the organization.

Using Backflipt

All the account managers in the organization installed Backflipt; Enabled backflipt to access office365 emails and OneDrive. Once the tool was configured, they went back to their way of business, i.e., using Outlook, Skype for business and updating SF. Product management team uploaded the new feature set document into "Staging" folder on OneDrive. PM team was able to immediately see the "impact" reach of the new feature set. Once confirmed, the document was moved to "Product Release" directory on OneDrive.

ACME2

ACME1

NEW
PRODUCT
DATASHEET
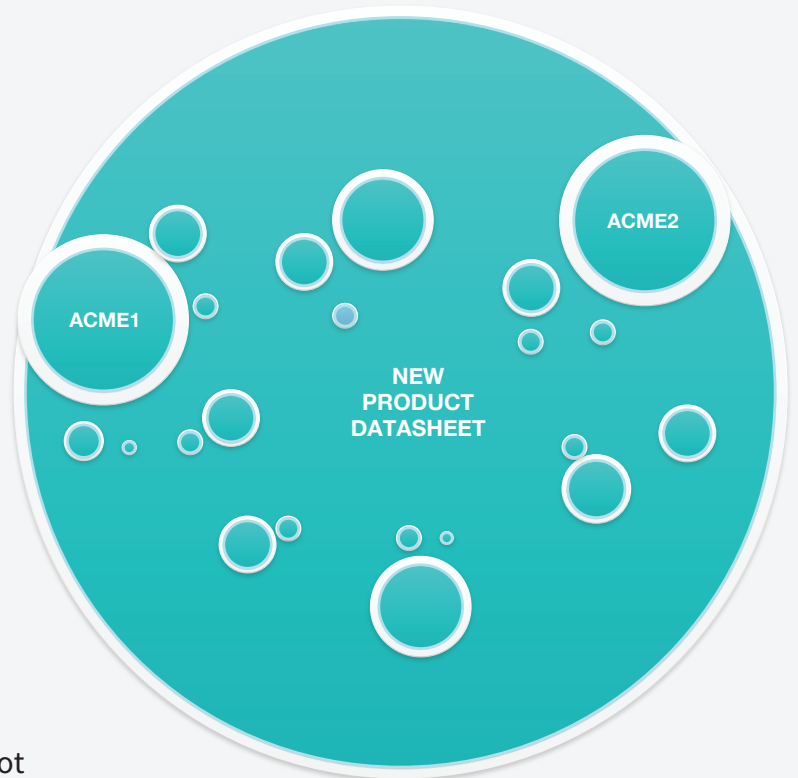
- All of the account managers now got
  alerts on Outlook, with a list of the customer list.
  In two clicks the content was transferred to the customers.

- PM team uses the "Impact" view periodically, and nudge the account
  managers if needed to get the new feature sent out to the customers.