

# SUCCESS STORY

## KEEN WEALTH ADVISORS

### THE CLIENT



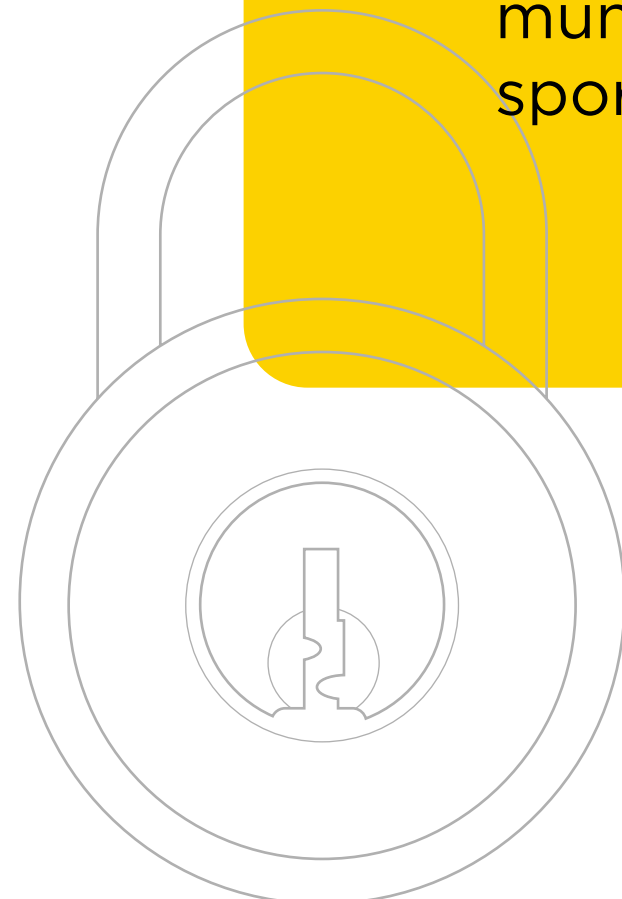
**KEEN WEALTH ADVISORS**  
*Perceptive. Personalized. Precise*

Keen Wealth is one of the top 5 financial advisors in Kansas who have successfully managed 500 Million worth of Assets. Keen Wealth is a Financial and Investment planning company specializing in Retirement and Estate Planning.

### CHALLENGES

*Previous consultant left before the project was completed. Access Global Group was contacted with only **one month** left in project timeline.*

1. Salesforce out-of-the-box lead conversion process was not suited for the customer to use Financial Service Cloud
2. Keen Wealth did not have the functionality to track customers' annual renewal dates and communications with customers was sporadic and inconsistent.
3. Keen Wealth had a large amount of unusable data in their system and was using production to test.
4. Required to use Orion Connect to transfer financial data from Orion but no current method existed
5. Incomplete customer data was hindering Keen Wealth



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### SOLUTIONS

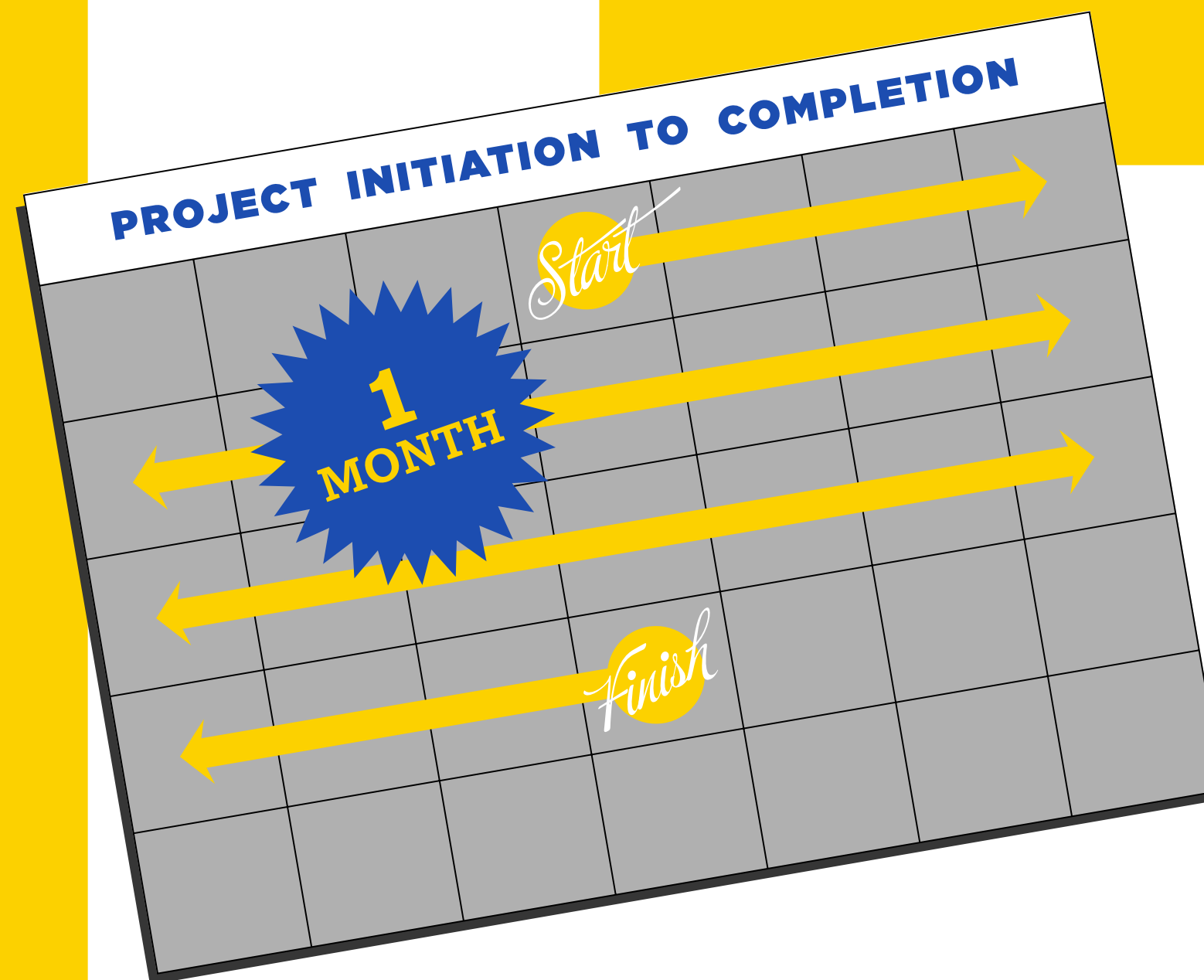
1. Created custom process for Keen Wealth rather than using the standard lead conversion process. FSC best practices were followed
2. Developed and implemented automation with tasks and email using renewal dates and contracts
3. Assisted in data clean-up and created a workflow to migrate data from Tamarac CRM system.
4. Successfully assisted Orion support in connecting Orion to Salesforce.
5. Developed automations for timely and effective follow-up with customers

### RESULTS

1. Finished setup and implementation in allowed time frame
2. Communications with clients are now consistent and on time
3. Can now track renewal dates and communicate before contracts expires
4. All data can now be accessed and used effectively

### IMPLEMENTED SOLUTIONS

-  SALES CLOUD
-  FINANCIAL SERVICES CLOUD



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