

## Case Study Overview

**HOW A LEADING FINANCIAL SERVICES BUSINESS WITH OVER \$100 BILLION OF ASSETS UNDER MANAGEMENT IMPLEMENTED SENTIA IN 4 WEEKS AND REDUCED SELLING COSTS BY 27%**

27% ↓

Selling costs

3 Week

Payback

40% ↑

Productivity

### BACKGROUND

Providing balance sheet and cash management solutions to US banks and other financial institutions for almost 50 years, the firm is a deposit and liquidity specialist for banks, trust/wealth managers, brokerages, and public and private entities.

### GOALS

Having already invested in the leading enterprise CRM two years earlier, the business did not want to replace this CRM but wanted to leverage this earlier investment and actually begin to generate productivity gains and revenue growth.



# IMPLEMENTATION & INVESTMENT

Sentia was installed on to the existing salesforce.com system and we analyzed daily practises to create a configuration and automation that dramatically overhauled the company's operation.

Deployment was within 4 weeks of project commencement.

Annual investment for the software, configuration and ongoing service and support \$13,500.

## OUTCOMES

**\$418,275** SAVED  
PER ANNUM

AUTOMATION OF DAILY ACCOUNT  
ANALYTICS REVIEW/FOLLOW UP

**\$26,665** SAVED  
PER ANNUM

THROUGH THE AUTOMATION OF KEY  
DATA ENTRY

**\$445,000+**

OVERALL RETURN ON INVESTMENT

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## PLUS

RISK REDUCTION

CALL CYCLE AUTOMATION

INCREASED MARKETING EFFICIENCY

COMMUNICATION BENEFITS

MANAGEMENT CONTROL & OVERSIGHT



# MAKE SURE YOUR CRM AND ERP WORKS AS HARD AS YOU DO

**Sentia completely changes how salespeople interact with their enterprise software, banishing data and providing prescriptive insights & next best actions.**

- **A Virtual Assistant – Everything they need to know throughout the day to maximize their outcomes,**
- **A Virtual Analyst – Everything they need to know about their effectiveness and how they are performing toward their goals & targets**
- **A Virtual Coach – What they need to do to improve and be better at their jobs.**

**Sentia also provides complete oversight across every team members' activity and drives results for management.**

## LEADING FINANCIAL SERVICES BUSINESS OUTCOMES

**27% ↓**

**Selling costs**

**3 Week**

**Payback**

**40% ↑**

**Productivity**



### **\*RECORDED MEASURED SAVINGS**

- Account Review & Follow up – 15 staff routinely spent 90 mins staring and comparing reports identifying accounts which needed action that day at an avg hourly cost of \$65
- Ongoing Key Data Entry – Emails from accounts & prospects manually identified in Outlook and from there a task created in salesforce with copied body of the email. Previous 12 months 8320 emails. Time taken 2 minutes per email at an avg hourly cost \$65.
- Daily account report analysis by Sales Managers required to oversee account service activity to identify where they may need assistance/support – 45 minutes each morning at an avg hourly cost \$65.
- Automating data imports. Previously taking 3 days per quarter at a \$90 p.a rate
- % Savings in selling costs – dollar amount saved / team wages plus 25% on-costs