

ALLEGiant PARTNERS CUSTOMER SUCCESS STORY



COMPANY

Allegiant Partners



INDUSTRY

Independent Financial Lender



OBJECTIVE

Ability to oversee and manage all data, automate client processes, third-party marketing integrations, and advanced reporting capabilities.



WHY

Allegiant needed to reduce the turnaround time for all business processes and be able to quickly pull data to make informed business decisions to scale the organization.

TECHNOLOGIES & SERVICES USED



sales cloud



StarrData's Salesforce Implementation

OUTCOME

TRIPLED THEIR BUSINESS

with just a 30% increase in employee size and have experienced an

80%

reduction in turnaround time.

BEFORE

Just for the client verification processes, Allegiant would have to FedEx documents to clients multiple times making it a long and tedious process to close a deal. Not only did their CRM lack the ability to keep up with their client's administration demands, but it also had minimal integration with third-party marketing tools.

They also needed a way to make their data quickly accessible so they could make informed business decisions to scale and grow the organization. With their current CRM, pulling reports and turning data into information was an arduous task that extended their sales cycle longer than desired.

AFTER

With the help of StarrData and their Salesforce administration services, they send DocuSign and it's as simple as the client pushing a button, they get a copy, and a deal is closed.

Their administration also expanded on the functionality put forth in the QuickStart to add in custom zip code lookup functionality and the inclusion of card tracking. This led to a new way of tracking the credit application process through StarrData's admin support.

With the inventory object project, they strengthened the flow of data from the credit application, through the allocation of inventory, to the tracking of the equipment and vendors involved.

StarrData also further streamlined the inventory association from the equipment records to the cyclical tracking of inventory assets and equipment.

StarrData was also instrumental in creating a clean and functional CRM with extensive training for Allegiant employees to make sure they had the knowledge and tools needed to succeed.



RESULTS

- All of Allegiant's data is centrally located, organized, and easily accessible at any point in time
- Administration services are completely automated; client processes that used to take them one week to complete, they can now accomplish in one business day
- With QuickStart's custom zip code lookup functionality, they can fully track the credit application process
- Allegiant can easily oversee and manage the entire processes from credit application, through the allocation of inventory, to the tracking of the equipment and vendors involved
- Salesforce has given them a competitive advantage with recruiting and business retention

CUSTOMER QUOTE

"We have essentially tripled our business with a minimal increase in employees."

"I am able to troubleshoot process issues from anywhere at any time to make sure our team is running at 100%."

"We can't thank you enough for helping us to build the architecture and foundation for what we've been able to utilize and build upon. If it wasn't for you guys, we wouldn't be where we are today!"

