

A Texas-sized Digital Transformation

How Stonebriar Spurred Growth & Rounded Up Deals

Stonebriar Commercial Finance is a privately held company that provides financing solutions to a wide variety of industries throughout the entire credit spectrum. As a rapidly growing Asset Management start-up, Stonebriar has faced incumbent competition from much larger firms in their ecosystem, all of which use outdated technology to originate deals from \$5M to more than \$50M.

Many challenges, mandated changes

Stonebriar had limited executive insight into their pipeline as well as the new lead qualification and loan origination opportunities for five major business platforms (General Equipment, Rail Leasing, Aviation, Sponsor Finance & Real Estate). Their processes were highly manual, requiring keying new opportunities into disparate systems for loans, leases, and post-book servicing.

An outdated website with limited content management capabilities made it hard to foster a dynamic external marketing presence for B2C and B2B customers — who are highly engaged on social channels. Stonebriar had no way to perform B2B retargeting to capture attention, measure engagement, or evangelize success.

The company was mandated by executive management and the board to grow book of business threefold while maximizing efficiency and minimizing headcount. It was clear they needed to grow firm optics and increase ecosystem presence in all channels for all platforms.

But how? Stonebriar knew they needed outside help, so they connected with Silverline to transform their digital ecosystem.

Strategic, layered solution

Silverline customized Sales Cloud to fit Stonebriar needs — enriching opportunities with external data sources to calculate risk and portfolio exposure, track staffing requirements, build approvals for required credit, asset and funding tasks, and track progress of underwriting.

We also integrated Stonebriar's Salesforce org with SuperTRUMP, Infolease, and Treasury and Market Rates systems so producers can efficiently price and close deals and executives can accurately forecast cash flow and portfolio performance. Along with these technology integrations, Silverline implemented pipeline & business activity reports with Conga so with a simple click, executives can quickly see the health, performance and scale of their lines of business.

To address Stonebriar's marketing needs, Silverline designed a brand new website front and back-end with robust Pardot



integration, which expanded their footprint, established differentiated business platforms for lead routing, and improved the customer experience through beautiful, intuitive design.

New Pardot mailing lists, templates, and landing pages allowed Stonebriar to segment, target, remarket, and build their referral pipeline. Silverline also extended Pardot capabilities to social channels via LinkedIn and Twitter to expand and measure engagement and route new leads or opportunities to the appropriate teams.

Lastly, automated Einstein Contact and Activity Capture improved productivity and provided actionable, predictive insights about deal pipelines to executives through Einstein Analytics.



Navigating new releases

From the start, Stonebriar had a large backlog of needed enhancements and new features with constantly shifting priorities. Silverline applied its Navigator delivery methodology to improve flexibility to re-prioritize as business needs shifted and move at a manageable velocity.

By constantly deploying new features — rather than introducing a complete solution all at once — Stonebriar successfully improved user adoption and brought new processes and users onto the platform with little pushback.

Measurable results

Silverline and Stonebriar successfully partnered to implement a robust CRM that addressed the challenges outlined when the project began. What did they accomplish? Since project end, Stonebriar successfully:

- Reduced time for deal origination from 72 hours to four hours
- Increased real pipeline throughput of over 2x (217%) YOY in the first year and 2.5x from January 2018 – April 2019
- Scaled from 103 to 130 customers within 15 months (26% increase) with one headcount addition, and from 302 to 372 contracts within the same period (23% increase)
- Originated over \$20M more/employee than closest competitor
- Increased deal origination by \$50M
- Issued five securitized bonds of \$2.25B since inception, two of which occurred after the Salesforce implementation completed—due to increased analytics, visibility, and performance (the sum of the two are almost 35% larger to the sum of the previous three)
- Grew portfolio by 34% Net Investment (AUM/portfolio value) competitor
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About Silverline

With significant expertise in the Financial Services industry, including banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies, Silverline combines Strategic Advisory, technical implementation, and ongoing Managed Services to enable organizations to achieve maximum value with the Salesforce platform. To find out more and get pricing information, contact us at financialservices@silverlinecrm.com.

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