

# Access Financial Sees 3x Lift in Originations with Marketing Cloud and FSC



Access Financial Services, Inc. (“Access”), through its subsidiaries, is a family of brands committed to offering financial solutions serving both consumers and retailers. Their success is shown in their growth with 1,000 stores and servicing of over 50 million loans. The company was founded in 1994 and is based in Cincinnati, Ohio.

Scott Dalton, Senior Director of Growth Optimization at Access said, “Before Salesforce, we were using Oracle. From a CRM perspective, it was sluggish, it was slow, it was hard to update correctly, and it wasn’t connected to anything. We didn’t have any real-time decision making here. And the system constraints didn’t allow for us to fully integrate with all our other systems. From a marketing email perspective, it was fine, but it lacked a 360 degree view of the customer-triggered communications. Capability wise, it just wasn’t there.”

Access was coming up on a contractual renewal with the marketing portion of their Oracle instance. They knew their agreement was going to end at some point and that they needed to make a decision on whether or not they wanted to renew or look at alternate solutions. So Access put out an RFP for alternate solutions to Oracle. They came to the conclusion of where they were headed as an organization and what they wanted to do. Salesforce was the best fit.

“Our account executive with Salesforce came to us with a couple of different options, including Silverline and two other firms. We brought everybody in and looked through their plans, listened to what everyone had to say. We felt that from a compatibility perspective and expertise perspective, Silverline was the better choice,” Dalton said.

## Diving in to Marketing Cloud and FSC Capabilities

Silverline and Access decided on a phased approach to the implementation. Project goals included:

- Integration with POS retail systems to send personalized, relevant transactional emails to individual customers based off in-person/retail transactions
- Integration of Marketing Cloud with Financial Services Cloud to easily access marketing history for each customer
- Orchestration of Marketing Cloud to service multiple customer brands while working from a single, central Financial Services Cloud platform
- Promote more frequent and thoughtful touchpoints with customers leveraging better insights into data
- Designing customer journeys to re-engage and provide relevant financial assistance options to customers and promote brand awareness
- Improve customer experience and overall lifetime value through marketing and process automation

Silverline completed phase one, and when we came back for phase two there were more advancements and new techniques that we wanted to bring into play. “There were some surprises during the engagement — Silverline brought to light some configurations we missed — opportunities for improved data storage, number of records, things of that nature. So we pivoted and corrected, and overall the project plan was spot on,” Dalton said.

The initial implementation met the business needs and a successful go-live occurred in May. As Access matured their strategy, they reached back out to Silverline as a trusted advisor to implement multiple, targeted marketing journeys for their large customer base.

## Introducing a multimedia approach to marketing

After implementation, the Axxess team enjoyed the newfound ease of use, which allowed them to set up journeys where they could path out everything with triggered communication. Whereas before, they had to manually send files or lists through for communications. "It's opened up additional touch points through the mobile aspect, allowing us to send texts versus just email and then aligning the two mediums so we have a more structured campaign approach. Before, everything was a one off and our systems didn't really connect or talk to each other," Dalton said.

After implementation they began a multi-touch marketing approach, wherein they aligned calling with text and email. They found that by setting the right cadence, they saw a 3X lift in their originations. "It was pretty significant compared to before when we would just email and then recipients would maybe call later that week. But when they were aligned together from a multitouch perspective, it was truly a 3X lift, which reinforced the fact that we need to think differently in terms of how we communicate and when we communicate," Dalton said.

Silverline delivered a well-integrated solution with Marketing Cloud that surfaced engagement metrics within Financial Services Cloud. It also catered and personalized capabilities to individual customers. Instead of aggregate reporting, Axxess gained a complete customer view on an individual level — and the ability to answer questions like "How engaged is this individual with the Axxess brand?", etc. That engagement information is viewable in FSC, but it is measured within Marketing Cloud, so the data gets surfaced and is visible in both Salesforce instances.

## Applying a customer-first business strategy

With Axxess, we provided solutions for the family of brands within their enterprise products, making it more efficient and easier to manage multiple brands across the Salesforce platform.

In terms of overall strategy, Salesforce "allows us to think differently with our retail environment. Whereas before we were very siloed. We had our retail customers and we had our online customers. Now we're able to bridge the gap to view and understand a whole collective of customers. So it doesn't matter if they're retail or online anymore. We can holistically cover everyone versus breaking down into those silos," Dalton said.

From a CRM or Financial Services Cloud perspective, Axxess has started rolling out more in-depth solutions for their stores. They are looking to implement Lightning dialer, and ramp up their mobile studio for additional product lines and businesses they serve.

Thanks to partnering with Silverline, Axxess Financial is equipped to move their marketing efforts farther and faster than ever before. "I think the Silverline project team was fantastic. They were knowledgeable, they were timely. And they were good to work with. They understood our business and they were able to ask and add solutions that we weren't thinking of early on. The partnership there was fantastic."

## About Silverline

Silverline has real-world expertise in the Financial Services industry, including banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies. We combine strategic planning, implementation, and ongoing support to help clients realize continuous value with the Salesforce platform. To find out more, contact us at [financialservices@silverlinecrm.com](mailto:financialservices@silverlinecrm.com).

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