

GuideStone Financial Resources

Integrated Sales Processes, Measurable Marketing Results.

A Salesforce.com Quickstart provides a footing for a budding business—and a platform to support long-term growth.

The Challenge

A fresh perspective on sales and marketing

Motivated by an initiative to expand its business into broker-dealer and registered investment advisor (RIA) relationships, GuideStone Financial Resources sought a fresh perspective on its sales and marketing processes and a new platform that would enable it to identify, target, and market effectively to its target audience.

The Solution

An uncommon blend of business and technology expertise

As the platform for building its budding broker-dealer and RIA business, the organization selected Salesforce.com. GuideStone turned to West Monroe Partners, a Salesforce Silver Certified Development Partner with years of financial services experience as well as deep technology and Salesforce platform expertise.

Importantly, West Monroe Partners offered a “Quickstart” development capability that would enable GuideStone to get the new platform up and running quickly. West Monroe Partners performed the Quickstart Salesforce project, relying on deep industry experience to help GuideStone define and enable its sales and marketing goals.

THE BOTTOM LINE

INTRODUCED LEAD-TO-CLOSE CAPABILITIES IN FOUR WEEKS



INTEGRATED SALESFORCE.COM WITH OTHER APPLICATIONS TO FACILITATE LEAD GENERATION, MARKETING, AND COMMUNICATION

GuideStone Financial Resources is a diversified Christian financial services provider, offering retirement, insurance, investment management, property and casualty coverage, and executive planning products and services. It sponsors the nation’s largest Christian-based, socially screened registered mutual fund family, GuideStone Funds.



One of the best consultant teams I have ever worked with. You could tell they were vested in the solution and cared to make sure our expectations were met. They were always quick to jump on our issues and concerns.



Tony Cupstid, IT Director, Program Management
GuideStone Financial Resources

Built on best practices, West Monroe Partners and GuideStone collaborated to create:

- ◆ A unified sales process aligned with the Salesforce.com Sales Cloud functionality and customized to fit GuideStone's needs
- ◆ A decentralized marketing process that enabled marketing and sales collaboration and was integrated with ExactTarget to facilitate e-mail marketing
- ◆ A clean data set, achieved by integrating the solution with DiscoveryData Link and refining the audience criteria to populate the new system with more than 100,000 potential broker-dealer and RIA representatives within GuideStone's target market

The Impact

Up and running in just four weeks

In only four weeks, GuideStone Financial Resources was able to achieve measurable marketing and sales results. With the unified process and centralized system, the sales and marketing team can identify and target new business in a transparent and reportable manner. The solution also allowed GuideStone to enable key processes. Users now conduct measurable e-mail marketing campaigns that reach a broad and applicable audience.

Finally, by working with West Monroe Partners, GuideStone built a foundation on which to grow. The organization is planning for additional integrations and applications as its business grows.



“I appreciated West Monroe’s dedication to delivering as promised. The team’s ability to wear both business and technology hats was extremely valuable.”

Harry Nelson
Executive Director