

Moving Sales from Spreadsheets to Automation

GIVE US A CALL (720) 410-7900

EMAIL US NUAGE-INFO@CONVERGEONE.COM



About Equi

Equi is an investment firm that is unlocking alternative investments for everyone—not just billionaires. Equi makes it safe and easy to invest in a custom, diversified and managed portfolio of private market investments to help clients achieve financial freedom, faster.

Equi's Challenge

Equi is designing the investment portfolio of the future and needed a digital CRM to manage its real estate leads and opportunities. In their startup phase, they launched with a manual system of spreadsheets, but quickly realized the need for a digital, cloud-based system that could grow and scale with them. Their siloed sales and client management systems, manual reporting, and undocumented processes made it challenging to collaborate, close deals, and support clients, so a speedy transformation was a top priority.

"Equi has been pleased with NuAge Experts for two primary reasons.

First, NuAge has the high-level Salesforce understanding to implement everything we ever need, going above & beyond our expectations, even suggesting better use case scenarios to improve our underlying sales process.

Second, and perhaps more important, we always know we can trust the NuAge Experts team to get the job done right the first time. This is invaluable in our fast-paced startup environment."



Marshall Hatfield, Head of Deal Sourcing



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The NuAge Experts Solution

NuAge Experts implemented Sales Cloud to give Equi better insight and management of its incoming leads and opportunities. By customizing, automating, and organizing critical data capture fields inside Salesforce, NuAge Experts eliminated time-consuming data entry and made it easier for Equi sales reps to follow up on and close deals. And by using Sales Cloud JumpStart as the base and customizing it to fit Equi's needs, NuAge Experts completed the implementation in just 8 weeks.

Results + Ongoing innovation

Post-implementation, Equi's sales reps are saving hours each week in routine data entry. Plus, they continue to leverage NuAge Experts for ongoing improvements to their Salesforce workflows to achieve better systematized sales pipeline management. Internal collaboration is faster and easier, and swarming a hot deal can now happen from anywhere. Equi also has better process documentation, which is making the next phase—integrating its investment fund opportunities with its real estate records—a no-brainer.

Success with Sales Cloud



"We continue to leverage NuAge Experts' expertise as our Salesforce build-out evolves, and remain grateful to have such a dependable, high-level expert available whenever we need them."

- Marshall Hatfield, Head of Deal Sourcing

