

Salesforce and Pardot Implementation for RIA

Mullin | Barens | Sandford Financial



LOCATION

Los Angeles, CA



EMPLOYEES

35



INDUSTRY

Financial & Insurance Services

Challenges

- Needed to broaden their scope of the age cohorts of investors they were reaching
- Lacked a platform to capture information for their web based marketing efforts.

Solutions

- Implemented Pardot Marketing on their website through Salesforce
- Integrated custom buttons through Salesforce to collect client information
- Created Custom Objects for agents to record notes on the clients
- Created a custom Excel template for collecting information from marketing efforts.

Mullin/Barens/Sanford Financial (MBS) Financial is an independent financial consulting firm in Los Angeles specializing in executive benefits, insurance, and estate planning. Believing more in tradition, rather than trends, MBS Financial is inspired by and dedicated to creating dynamic financial strategies that drive success. In this vein, MBS came to Cloud Creations desiring to put their services in front of younger and newer generations of potential investors. In order to do this MBS knew that they needed to accomplish 2 things. One, they needed to “up” their marketing efforts, and two, they needed to use the results of their marketing efforts to strengthen their ability to build new investor relationships.

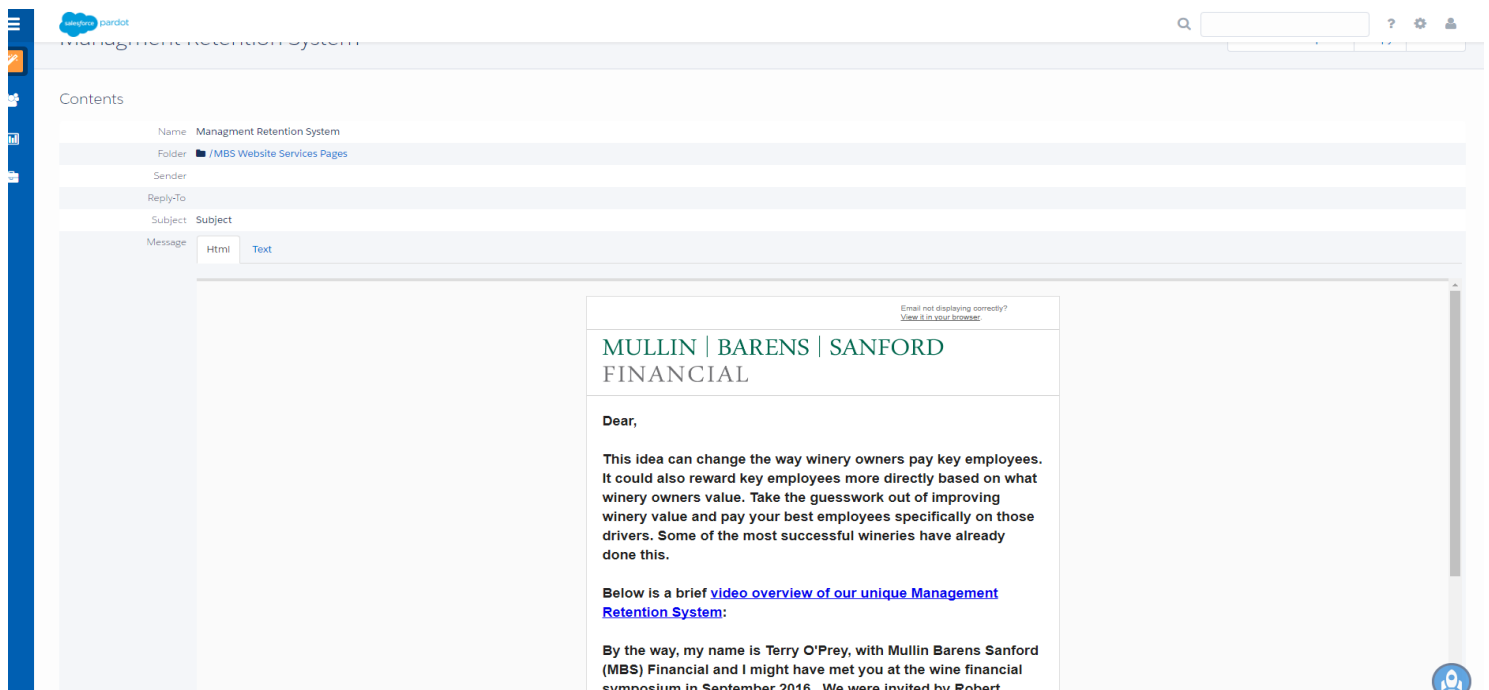
For MBS’s marketing efforts Cloud Creations setup the Salesforce product Pardot® on their website. Several custom buttons integrated through Salesforce were built for this project; such as an email template that had links which were able to collect client information. A custom object for “notes” was also built which allowed MBS agents to keep a record of contacts and allowed for the integration report fields that could catalog the information from the contacts and notes generated by the email templates. Cloud Creations also used Pardot® to build a template that replicated information as it would be

Results

- MBS has a software platform to boost their online marketing efforts
- The success of marketing efforts as well as decisions for future ones are informed by data gathered during marketing campaign

stored using Excel in Microsoft. This build-up featured a vertical view – like Excel – for “Project Task Reports” and integrated a “My Tracker” application for the purpose of collecting more information pertinent to MBS’s marketing campaign efforts. In the end, with the help of Cloud Creations, MBS had the software platform, and integrations they needed to boost their marketing and relationship building efforts.

Pardot Email Template Screenshot



Custom Object: Notes Screenshot

Custom Note Edit
New Custom Note

Custom Note Edit [Save] [Save & New] [Cancel]

Information

Custom Notes Name:

Account:

Contact: Erik Speed

Administration:

Description:

← → **B** *I* U **S** [Link] [Image] [List] [Table] [Table] [Table] [Table] [Table] [Table]

Owner: Britney Valenzuela
Date: (8/4/2017)

[Save] [Save & New] [Cancel]

Custom Reports Screenshot

Grouped By: Plan Name
Sorted By: Plan Name

Date	Account: Account Name	Custom Notes Name	Description	Created Date	Last Modified Date	Created By: Full Name
Plan Name: Atos Deferred Compensation Plan (1 record)						
-	Atos	CRM Call	Waitin on Ernie	8/2/2017	8/2/2017	Terry OPrev
Plan Name: LEDVANCE LLC Deferred Compensation Plan (3 records)						
7/31/2017	Ledvance, LLC	CRM Call	test terstsd,fims ;ASDMf,ds ;IASMDf,	8/2/2017	8/2/2017	Terry OPrev
7/10/2017	Ledvance, LLC	Erik CRM Call	Tesst	8/2/2017	8/2/2017	Terry OPrev
7/31/2017	Ledvance, LLC	CRM Call	TEst aasdflmajdsf alsdfnadf alsdfnskl	8/2/2017	8/2/2017	Terry OPrev
Plan Name: Siemens Corporation Deferred Compensation Plan (5 records)						
-	Siemens Corporation	CRM Call	- Client is happy with - Allison to - a_dflaidsfmdsffm	8/2/2017	8/2/2017	Terry OPrev
7/10/2017	Siemens Corporation	07312017_Erik CRM Call	Siemens missing informatoin waiting in more information - Allison is to send us more information - Craig cannot locate the insureds in Germany a_dsmfhalksa ' a_sdmvflasdmvfasmdv'adv	8/2/2017	8/2/2017	Terry OPrev
7/31/2017	Siemens Corporation	7_31_2017 CRM Call	JOHNS NOTES	8/2/2017	8/2/2017	Terry OPrev
8/2/2017	test	testnotes	test	8/2/2017	8/2/2017	Britney Valenzuela
7/31/2017	Siemens Corporation	CRM Call	Testing to see if this capture the date of the entry. siemens this that	7/28/2017	8/2/2017	Terry OPrev
Grand Totals (9 records)						

Check rows to filter, then drill down by: [--None--] [Drill Down]

Confidential Information - Do Not Distribute

Custom Reports Screenshot

Project Tasks Reports

Report Generation Status: Complete

Report Options:

Summarize information by: --None-- Show All project tasks

Time Frame: Date Field Deadline Range Custom From To

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Project	Account: Account Name	Project Task: Task Name	List	Project Task: Owner Name	Deadline	Completed (Hrs)	Estimated (Hrs)	Contact	Description
Siemens 3/7/2017 Meeting Prep	Siemens Corporation	Siemens Meeting Deck & Agenda	Finished	Terry O'Prey	2/28/2017	-	3	-	
LEDVANCE	Ledvance, LLC	Plan Design Review	Finished	Terry O'Prey	2/27/2017	3	3	-	
AdvanSix RFP	AdvanSix, Inc.	AdvanSix Bidder Questions	Finished	Terry O'Prey	2/27/2017	1	1	-	
AdvanSix RFP	AdvanSix, Inc.	Prepare RFP Timeline	Finished	Terry O'Prey	2/9/2017	1	1	-	
AdvanSix RFP	AdvanSix, Inc.	RFP Preparation	Finished	Terry O'Prey	2/9/2017	4	4	-	Prepare RFP and Timeline and Send to John Sanford
Siemens Plan Audit	Siemens Corporation	Markup Siemens Manual Process Doc	Finished	Terry O'Prey	2/8/2017	3	2	-	
MBSFIN.com Update	Mullin Bares Sanford Financial	Create mock up of website	Holding	Terry O'Prey	2/24/2017	-	3	-	
AdvanSix RFP	AdvanSix, Inc.	AdvanSix Funding Decision	Started	Terry O'Prey	2/27/2017	5	3	-	
Siemens 3/7/2017 Meeting Prep	Siemens Corporation	Nantucket Options	Finished	Terry O'Prey	2/23/2017	6	6	-	Provide options for asset & liability of Nantucket spinoff.
Siemens 3/7/2017 Meeting Prep	Siemens Corporation	Towers Watson RECON	Finished	Terry O'Prey	3/1/2017	-	3	-	Review Erik Speed recon of Towers Watson items and bi-weekly spread
AdvanSix RFP	AdvanSix, Inc.	ABC	Holding	Terry O'Prey	3/9/2017	-	2	-	
AdvanSix RFP	AdvanSix, Inc.	AdvanSix RFP Formal Summary	Prioritized	Terry O'Prey	3/10/2017	-	4	-	
LEDVANCE	Ledvance, LLC	Ledvance Fact Sheet	Holding	Terry O'Prey	3/13/2017	-	1	-	
LEDVANCE	Ledvance, LLC	Ledvance Rabbi Trust	Holding	Terry O'Prey	3/13/2017	-	2	-	
Siemens Plan Audit	Siemens Corporation	Siemens Mtg Minutes	Started	Terry O'Prey	3/9/2017	-	2	-	
OSRAM Rabbi Trust	OSRAM Sylvania, Inc.	Rabbi Trust Comparison	Finished	Terry O'Prey	2/24/2017	3	1	-	
OSRAM COLI decision	OSRAM Sylvania, Inc.	OSRAM COLI decision	Holding	John Sanford	3/31/2017	3	3	-	COLI funding decision is waiting for CEO to decide mid to late March 20
OSRAM COLI decision	OSRAM Sylvania, Inc.	OSRAM COLI decision	Holding	John Sanford	3/15/2017	-	3	-	
Grand Totals (18 records)									

Contact Fields Screenshot

Erik Speed Customize Page |

Show Feed Click to add topics:

Related Accounts (1) | Opportunities (0) | Open Activities (5+) | Notes (1) | Files (0) | Activity History (5+) | Cases (1) | Custom Notes (2+)

Contact Detail Edit Delete Clone

Name: Erik Speed Contact Owner: [John Sanford \(Change\)](#)

Account Name: Prudential Retirement Reports To: [View Org Chart](#)

Title: Vice President | Client Relationship Manager | Total Retirement Solutions Department:

Email: erik.speed@prudential.com Last Stay-in-Touch Save Date:

Phone: (310) 744-3065 Fax:

Mobile: (310) 488-4411

Insurance License: CA Insurance License #0D30305

College Attended:

Spouse:

Address Information

Mailing Address: 100 N. Sepulveda Blvd
Suite 500
El Segundo, CA 90245

Hobbies/Interest:

System Information

Created By: [John Sanford](#) 9/11/2016 12:34 PM Last Modified By: [John Sanford](#) 9/11/2016 12:34 PM

Custom Links: [LinkedIn](#) [Google Maps](#) [Google Search](#)

Edit Delete Clone

Opportunity Fields Screenshot

nts Contacts **Opportunities** Products My Tracker Reports Dashboards Files +

Opportunity COLI Customize Page | Edit Layout | Printable

Show Feed Click to add topics ?

Contact Roles | Files | Notes | Products | Open Activities | Activity History | Project Tasks

Opportunity Detail

Edit Delete Clone

Opportunity Name	COLI	Opportunity Owner	Terry O'Prey <a>[Change]
Account Name	Plano Synergy Holdings	Close Date	11/21/2016
Type	New Business	Stage	Closed Won
Primary Campaign Source		Probability (%)	100%
Budget Confirmed	<input type="checkbox"/>	Amount	\$71,250.00
Discovery Completed	<input type="checkbox"/>	Compensation Data	
ROI Analysis Completed	<input type="checkbox"/>	Enrollment Timing	
Loss Reason		Plan Liability Amount	
Administration		Plan Asset Amount	
Vendor		\$ Collected	
RFP Due Date		RFP Release Date	
Demo date			
RFP Report Date			

▼ Additional Information

Next Step	Lead Source	Word of Mouth
Description		

▼ System Information

Created By	Terry O'Prey , 9/30/2016 8:20 PM	Last Modified By	Britney Valenzuela , 6/21/2017 8:00 PM
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Edit Delete Clone

Content Data