



# MOVING SALES FROM SPREADSHEETS TO AUTOMATION



## AT A GLANCE

Equi had siloed sales and client management systems, manual reporting and undocumented processes, making it a challenge to collaborate, close deals and support clients. NuAge Experts, a ConvergeOne Company implemented Sales Cloud to give Equi better insight and management of its incoming leads and opportunities. As a result, Equi's sales reps are saving 4+ hours each week in routine data entry.

## BUSINESS EXPECTATION + RESULTS

# ENABLING AN INVESTMENT PORTFOLIO OF THE FUTURE

## **=** EQUI

- + Equi is an investment firm unlocking alternative investments for everyone—not just billionaires. It needed a digital CRM to manage its real estate leads and opportunities, replacing spreadsheets.
- + NuAge Experts, a ConvergeOne Company customized and automated critical data capture fields inside Salesforce to eliminate time-consuming and error-prone data entry.
- + Equi continues to leverage NuAge Experts, a ConvergeOne Company for ongoing improvements to its Salesforce workflows to achieve better systematized sales pipeline management.



**SCALABLE  
AUTOMATION**

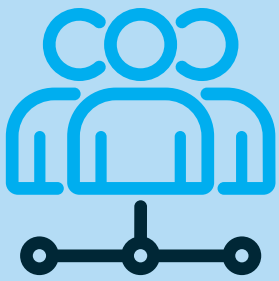


**INCREASED  
EFFICIENCY**



**SYSTEMATIZED  
PROCESSES**





## THE PURPOSE

An automated system to elevate internal and external collaboration with streamlined business processes.

PROVEN, PROGRESSIVE, PURPOSEFUL

## ONGOING INNOVATION

- + NuAge Experts, a ConvergeOne Company created an automated and simple sales process to help sales reps follow up and close deals faster.
- + Internal collaboration is faster and easier, and swarming a hot deal can now happen from anywhere.
- + Better process documentation is making the next phase—integrating its investment fund opportunities with its real estate records—a no-brainer.



*“Equi has been very pleased with NuAge Experts, a ConvergeOne Company. The team has high-level Salesforce understanding to implement everything we ever need, going above and beyond our expectations, and even suggesting improved use-case scenarios to improve our underlying sales process. Plus, we know we can trust the NuAge Experts, a ConvergeOne Company 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, EQUI

# 80

2021

Net Promoter Score

ConvergeOne is here for you. Our customer-centric approach is validated by our World Class Net Promoter Score of 80.

Schedule a conversation to learn more about our innovative solutions that can help you achieve your desired customer experience outcomes: