

Why West Coast Financial Group outsourced its CRM services to CongruentX

How partnering with a CRM consultant helped the firm to better manage relationships with clients

Highlights of Customer Challenge

- Provide expertise on integrating and using CRM
- Identify and solve CRM-related issues
- Build queue for client service team
- Streamline and automate, scheduling system
- Integrate marketing tools and metrics into CRM
- Set up fixed fee partnership

Solution Highlights

- Provide expertise on integrating and using CRM
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Client Details

- Family owned and operated financial services firm
- 35 employees
- About \$1 billion under management
- Founded on principles of honesty, integrity, and old-time values

Co-founded by Bret and Rick Smith in 1982, West Coast Financial Group is a family owned and operated financial services firm based in Florida. It provides financial, retirement, business & estate planning, asset protection, investment & tax strategies, and insurance analysis. Its team of financial planners and advisors adhere to old-time values when providing personalized, authentic services and developing meaningful relationships with clients.

The Business Challenge

For the last four years, West Coast Financial Group has been running two systems to manage its clients' accounts. It uses Tamarack (accounting software that is specific to the financial services industry) for accounting, financial performance, and billing, and Microsoft Dynamics for customer relationship management (CRM). Because the two systems are integrated, advisors can view their clients' personal information and financial accounts from either dashboard.

The systems were customized for the firm's specific needs. However, it was becoming a challenge to understand and efficiently use the systems' myriad features. Jason Alexander, Director of Information Systems for West Coast Financial Group, thought there was too much to know and manage alone. He lacked the in-house resources and expertise to make the best use of the CRM's features. He was also taking on more leadership duties, and had to offload some work to make better use of his time.



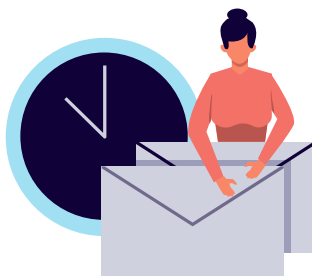
“We needed to bring in someone with expertise in these systems to avoid having to wait for me to learn how to do everything,” said Alexander. “We asked our partners, including Tamarack and Schwab, for recommendations on who we should work with. Following several referrals, we found CongruentX. After checking out their website and meeting with Chuck and his team a couple of times, we determined this was the partnership we were looking for.”

CongruentX: CRM expertise and improved communications

When Alexander first met with the CongruentX team in 2020, it became immediately clear they possessed the required expertise. They were able to confidently explain and provide immediate solutions to West Coast Financial Group’s issues with its complex CRM. They demonstrated extensive knowledge of the CRM’s backend—even more than Alexander, who had been working with the CRM for some time. CongruentX is a Microsoft partner, and the team had all the necessary certifications to back up their expertise.



“I was impressed by how easy they were to communicate with,” said Alexander. “They were easy to talk to and brought a commonsense approach to things. I was also surprised they actually solved some problems for us in the first day or two with minimal knowledge of our overly complicated CRM.”



The Results

Improved efficiency and effectiveness

CongruentX helped West Coast Financial Group to achieve its goals by:

01

Building a queue for the client service team

CongruentX enabled the firm to support clients using a queue-based team approach, making it nimbler and more efficient. This ensures clients are always supported and no individual employee is overwhelmed with work. effective and efficient.

02

Leveraging automation and scheduling

CongruentX integrated scheduling into the firm's CRM, enabling clients to set up their own meetings with advisors. It created significant time savings for the firm's advisors and improved their overall efficiency.

03

Setting and tracking metrics

West Coast Financial Group recently rolled out a new compensation structure. CongruentX helped the firm to build out and track metrics that are integral to its compensation structure. They were also flexible in helping the firm adapt to its changing KPIs.

“If you’re starting out with CRM or migrating to Dynamics, I encourage you to not do it yourself,” said Alexander. “You’ll end up remaking all the processes like we’re doing now. It will take longer than working with professionals. From the start, CongruentX was willing to meet with the executive team and ask the right questions, which comes from their experience of doing this before.”

Best Practices Used

CongruentX employed the following best practices when working with West Coast Financial Group:

01

Provided expertise in the use and management of the CRM

02

Solved problems and reduced complexities in the CRM

03

Ensured consistent communications and understanding of issues

04

Built a queue to improve efficiency and effectiveness of client service team

05

Leveraged scheduling and automation to Improve customer service

06

Leveraged scheduling and automation to Improve customer service

We help companies align marketing, sales, and service with IT for better business results. Our goal is to Get CRM Right so our clients can better serve their customers. We do this by focusing on people not resources, clients not just projects, and outcomes not hours.

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