MassMailer Enhances Outreach and Prospecting for Advanced Portfolio Management

Smarter Prospecting: APM + MassMailer Success
Read on to learn how APM simplified outreach, shared rich content, and managed 70,000+ contacts seamlessly with MassMailer.

For Advanced Portfolio Management, a financial advising company, emails form an important part of their prospecting and research-sharing workflows. MassMailer helped them set up their mailing lists effectively and share their market research with clients. The bulk email tool was a great addition to their prospecting activities as well.

The Company

Advanced Portfolio Management is an institution-focused asset manager that designs, creates, and manages tailored investment solutions for pension funds, foundations, endowments, insurance companies, banks, and other financial institutions in North America, Europe, and Asia.

Their services include investment management, risk management, and advisory services. APM structures actively manage client investments in real-time using diverse account formats, such as separately managed accounts, special purpose vehicles, and more.

Before MassMailer, APM was using MailChimp as its email outreach and prospecting tool, but it ran into several challenges. Let's understand how MassMailer helped APM navigate these difficulties and add value to its workflows and emails.

The Challenges

APM faced challenges with managing email communications with their extensive client base. MailChimp was not able to provide APM with a smooth integration with Salesforce, giving rise to other email challenges. The key difficulties were:

High Volume of Contacts

APM manages over 70,000 contacts across 30,000 organizations. This diverse client base also comes with an equally long string of emails that must be created and tailored to every institution's specific needs, portfolios, and preferences.

Additionally, during the prospecting exercise, APM creates content around their company in an email sent to every contact person. This is close to 60,000 emails, not counting the research emails that are a further 20 or 30 per year.

With such a high volume of emails going out to every person in their contact book, APM was looking for affordability, which MailChimp couldn't provide.

Rich Content and Email Attachments

As a way to foster client confidence in their brand, APM publishes intellectual research content every once in a while – content that they share free of charge with everyone on their mailing list as an attachment.
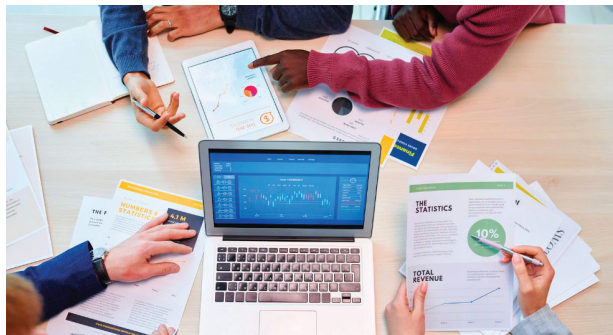
Adding images, charts, and other visual media elements in the attachment invariably makes it a heavy file to share over email, something that MailChimp wasn't completely capable of handling.

Furthermore, adding this attachment to emails that go out to the entire mailing list 30 times a year was a workflow in itself that required custom templates and processes. With MailChimp, APM was conducting A/B tests to check the efficacy of their campaigns, which was time-consuming.

MassMailer stepped up to these challenges and provided APM with simple yet robust bulk mailing solutions.

The Solutions

MassMailer offered APM a seamless integration with Salesforce, which significantly eased their bulk emailing operations. It provided APM with flexible email creation capabilities that enabled them to optimize their outreach and prospecting campaigns by a long mile.

Template Builder

MassMailer equipped APM with a simple template builder that enabled them to create custom templates for prospecting and outreach campaigns. APM could now use this tool to quickly mobilize their prospecting with research attachments, custom email bodies, etc., and initiate it without the need for A/B testing.

Competitive Pricing for Bulk Emails

APM has a set process for prospecting where a list of approximately 60,000 contacts receives emails with attachments about 10 to 30 times a year. Salesforce does not affordably support bulk email in such high numbers, and MailChimp couldn't provide APM with the economies of scale with emails they required.

MassMailer, a Salesforce-native app, enabled APM to draw more power from Salesforce by augmenting the bulk email feature with its own capabilities. The integration and migration were minimally disruptive and enabled APM to send bulk emails without adding costs.

Campaign creation was simplified with MassMailer, enhancing the tool's usability by eliminating over-engineering in the email process.

The Impact

With the help of MassMailer, APM was able to simplify its email procedures right from creation to follow-ups. Mr Matthew Hansen highlights that one or two in every 20,000 emails get a response for further inquiry, and with MassMailer, it is easier to manage cascading processes.

Additionally, MassMailer enables APM to reduce the prospects' decision-making steps. On some occasions, Mr. Hansen leverages the simple HTML tool to rebuild prospecting emails and share research instead of sending them as attachments.

When their prospects open this email, and if the content in the body is of interest to them, they immediately start and keep reading. This eliminates the consideration step that would otherwise come into play if an attachment needed scanning and downloading before it could be read.

MassMailer's simplicity, affordability, and ready integration with Salesforce have enabled APM to streamline its outreach and prospecting functions.

The Result

MassMailer has proven to be a value-rich switch from MailChimp for APM. They can now stay connected with their clients and grow their businesses freely without having to worry about the technicalities of setting up custom prospecting campaigns or quickly composing an email to respond to an inquiry.

MassMailer helps APM avoid unnecessary complexity in Salesforce because it is a native app and doesn't require extensive integration procedures or migration. It has made bulk emails affordable for APM while reducing the time they spend on A/B testing, composing, and sending emails to their mailing list.

Outreach Made Simpler with MassMailer

Emails are an excellent tool for establishing a one-on-one connection with your audience, which is why they are so important today.

MassMailer helps you build emails quickly with features like Email Wizard, which has a Salesforce-friendly interface. You can enhance your outreach by scheduling emails to be sent at any time in the future (this feature can also be effectively used for prospecting).

Enhance your prospecting functions using MassMailer's detailed email reports that allow you to track the KPIs on every campaign and email you initiate. Track open rates, click-through rates, bounces, etc., to gauge exactly where your campaigns stand.

Get on a 15-DAY FREE TRIAL → www.massmailer.io

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