

## HFM ADVISORS PROSPECTS SMARTER WITH MASSMAILER

Discover how HFM improved email performance and reduced costs by moving from HubSpot to MassMailer's Salesforce-native platform.



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Every business must send its audience emails, whether for promotions, information sharing, education, or any other purpose.

Especially for businesses that frequently share educational content with clients, emails deliver a stunning open rate of 40.08% for newsletters, making them a critical medium for connection.

Outreach and marketing tools like Salesforce and HubSpot provide businesses with a feature-rich platform. However, sometimes simplicity is the best approach to achieving simple marketing goals (like ensuring high deliverability for emails).

The challenges that HFM Investment Advisors (LLC) faced were of a similar nature while they used HubSpot.

Let's take a deep dive into how MassMailer helped HFM solve its challenges with simple tools and processes.


## THE COMPANY

HFM Investment Advisors LLC exists at the cusp of education and innovation. It helps its clients make informed financial decisions and build their confidence. The company believes in providing ethical financial advice that puts clients' needs first.

HFM tirelessly works to remove the barriers that prevent people from seeking financial advice, educating them on the mindset that investments can be beneficial for everyone. The company places integrity, dedication, teamwork, and humility at the core of all its services and operations, ensuring the clients get access to the unique skills that help them gain financial confidence.

HFM used HubSpot before Massmailer to share their promotional and educational investment content. However, the former platform did not meet their requirements as they had hoped.

Let's take a look at some of the challenges HFM faced while using HubSpot.



## THE CHALLENGE

Before adopting MassMailer, HFM relied on HubSpot for the email campaigns. The platform had many great features for marketing and capturing leads, but it was misaligned with HFM's operational needs.

The company faced three key challenges with HubSpot, which triggered the need to switch to a different platform:



### Exorbitant Costs

HubSpot offered a host of excellent features. However, HFM didn't immediately use these capabilities, making this feature deck irrelevant—an added expense. This created a situation of inefficiency in resource allocation toward a superfluous platform.



### Underutilization

HubSpot is focused more on delivering marketing features to its users. HFM did not have a dedicated marketing team to utilize all these capabilities of the platform, leading to a drastic underutilization.



### Deliverability Issues

HubSpot also presented frequent issues with email deliverability, which increased the follow-ups and workload on the team. Ms. Valentina Lucchetti said that every time a mail failed to reach a client's inbox, she would need to personally call each one of them to ensure that they received it the second time. These challenges necessitated HFM switching to a solution with features that aligned with their operations. Let's understand how MassMailer solves these difficulties for HFM.

## THE SOLUTION

HFM's transition to MassMailer helped them address the drawbacks of the previous platform while also delivering more benefits and enhanced value.



### Streamlined Operations

MassMailer is a Salesforce-native app that allows HFM to work directly from within Salesforce. This reduced their need for extensive integrations or data imports/exports, and they could easily consolidate all their outreach, educational, and promotional campaigns within one system. It helped them simplify their workflows significantly.

### Improved Deliverability

MassMailer drastically enhanced HFM's email deliverability as compared to what HubSpot was able to achieve. This reduced the workload on their teams and gave them a sense of reliability on MassMailer, helping them establish seamless client communication. It resolved a critical pain point that HubSpot had created for them.

### Ease of Adoption

MassMailer's ease of use is second to none. Additionally, being native to Salesforce, the assimilation of this app into enterprise systems is seamless.

For HFM, access to training videos and other integration resources was enough for onboarding and learning. There was no requirement to hire an integration professional or additional staff to configure MassMailer properly.

### Cost-Effectiveness

While HubSpot was an excellent platform in and of itself, HFM had to spend a lot of money on features it didn't need.

On the contrary, MassMailer provided them with the functionality they needed and used daily, improving the platform's value and delivering immediate savings.

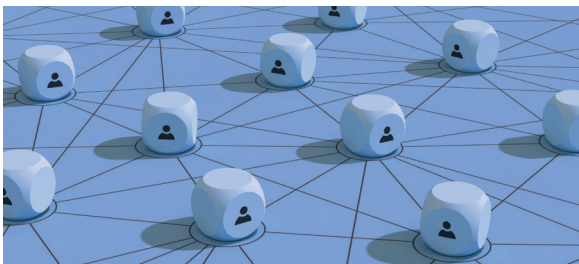
## THE IMPACT

MassMailer introduced significant improvements to HFM's email workflows:



### Enhanced Efficiency

MassMailer reduced the complexities associated with emailing operations by bringing everything together on Salesforce. There was no need to switch between platforms or import/export/synchronize any data between two different platforms. This enhanced emailing efficiency for HFM.



### Seamless Communication

Email deliverability was a key challenge that HFM faced with HubSpot. MassMailer enhanced this metric for HFM, establishing uninterrupted communication with their clients. It took away the constant need to confirm whether or not the clients received a communication.



### Cost Optimization

Resource allocation is a delicate thread that connects all organizational operations and functions. With MassMailer, HFM realized cost savings by investing in a product that had the features they actually used and needed. MassMailer also enhanced the investment value by providing easy integration and a simple user interface, which helped ease their learning curve.

## THE RESULT

HFM Investment Advisors had a niche need from their emails—to be able to share educational and promotional content with their clients easily. This included sending one-off emails once in a while with special information for their plan participants.

MassMailer empowered HFM to realize better email deliverability and enhanced the value for money they got with the platform.

With newer features (like messaging and drip campaigns) launching in the newer versions soon, HFM can stay tuned for more operation-enhancing capabilities with MassMailer.

## ENHANCE EMAIL SIMPLICITY AND VALUE WITH MASSMAILER

Using the right outreach tool is crucial for enterprises that use emails extensively to connect with their audience.

MassMailer helps you build your emails quickly using ready-made templates, send emails to any standard or custom object, monitor your campaign results, optimize your emails, send unlimited emails, and much more. It's a full-fledged emailing suite native to Salesforce that empowers you to take control of your email operations.

Get on a 15-DAY **FREE TRIAL** → [www.massmailer.io](https://www.massmailer.io)



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