

A Digital Lending Platform's Salesforce Email Transformation

Read on to learn how a digital lending platform streamlined client outreach, improved branding, and enhanced reporting with MassMailer for Salesforce.



Overview

This MassMailer customer is a leading Software-as-a-Service (SaaS) provider that specializes in digital lending solutions for financial institutions. They serve clients such as banks, credit unions, and consumer reporting agencies, for which their communications rely heavily on clear and compliant outreach.

They faced significant challenges in orchestrating efficient client communications across their product and support teams. This case study examines how MassMailer addressed these challenges for the customer through its seamless integration and dedicated features.

The Challenges

The digital lending platform provider faced several key challenges with Salesforce and existing email solutions that stunted their outreach efforts in several ways:



Inefficient Outreach

The customer relied on tools like Outlook (or a limited use of HubSpot) for outreach, which resulted in slow and fragmented communications. After migrating to Salesforce, the email outreach from Outlook continued to hinder their mass outreach, leading to inefficiencies.



Lack of Branding

Emails sent by the customer from individual addresses were not consistently branded – or lacked branding altogether – making the communications appear unprofessional and less impactful.



Data Siloes

Salesforce made it challenging to build recipient lists that would enable them to track delivery, open rate, bounces, etc. The fragmented records that existed across various platforms (Salesforce, HubSpot, and NetSuite) led to uncertainty in their targeting efforts and difficulties with tracking email.



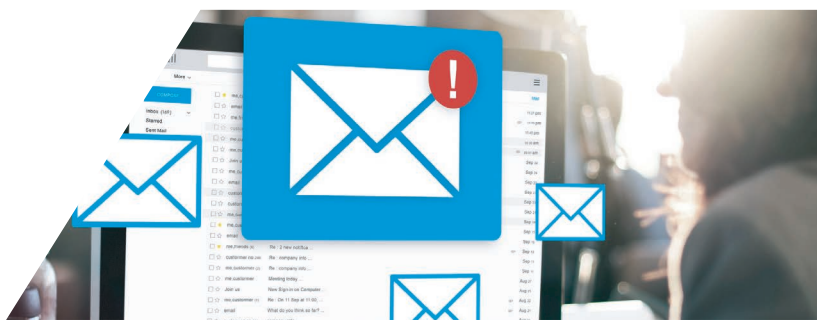
Global Unsubscribe Pitfalls

The mismanagement of global unsubscribes had a negative impact on service communications, resulting in several recipients inadvertently opting out and missing critical communications from the customer.



Manual Processes

The lack of automation with older tools necessitated the manual execution of campaigns, email creation, and personalization, which were labor-intensive and time-consuming tasks.



The MassMailer Solution

By implementing MassMailer, the customer was able to solve all its challenges and achieve high efficiencies in email workflows in the following way:



Templates and List Management

MassMailer features a drag-and-drop email builder, which allows the customer to achieve consistent branding and create visually appealing emails without using HTML coding. Additionally, they can now use dynamic list views to target cohorts directly within Salesforce, leveraging intrinsic contact data.



Unified Salesforce Integration

MassMailer is integrated directly within Salesforce, which allows the customer's teams to send fully branded, professional emails from their system addresses. This centralized the flow of communication and simplified sending workflows.



Centralized Reporting, Collaboration, and Improved Targeting

The customer's product and support teams could collectively review past campaigns, verify the content sent to clients, and coordinate their follow-ups directly from within Salesforce. Additionally, MassMailer eliminated the daily and batch email limits imposed by Salesforce, allowing the customer to run large-scale campaigns.



Metrics, Bounce, and Unsubscribe Reduction

The customer utilized MassMailer's built-in analytics to track key email metrics, including opens, clicks, bounces, and unsubscribes, for every campaign. It helped them validate the effectiveness of message delivery.

MassMailer also offers an in-platform email verification option to reduce bounce rates and ensure high list quality.



Elevate Your Salesforce Emails with MassMailer

The customer successfully overcame significant outreach challenges by implementing MassMailer for Salesforce. This integration allowed them to create branded emails, derive reliable metrics, manage client notifications, and support their teams seamlessly.

Try MassMailer for **FREE** → www.massmailer.io



Arti Devaki
CEO

+1 (408) 480-7334

✉ arti@massmailer.io

in [linkedin.com/in/artidevaki/](https://www.linkedin.com/in/artidevaki/)



Siva Devaki
Co-CEO

+1 (650) 248-7958

✉ siva.devaki@massmailer.io

in [linkedin.com/in/sivadevaki](https://www.linkedin.com/in/sivadevaki)

**MASS
MAILER**

☎ +1 (800) 297-0991
✉ hello@massmailer.io
🌐 www.massmailer.io