



VULCAN
VALUE
PARTNERS

Email Campaigns with a Human Touch

Vulcan Partners Case Study
Financial Services

Email Personalization at Scale with MassMailer

MassMailer equips Vulcan with Campaign Targeting Features. Explore how Vulcan scales up its email campaign while retaining the human touch using MassMailer in Salesforce.



Introduction

Vulcan, a boutique investment management firm based in Alabama, primarily serves institutional clients that include hospital systems, university endowments, pension plans, and the like. They have a dedicated service team for high-touch, personalized communications to maintain strong relationships with hundreds of stakeholders.

Vulcan had been using ACT CRM before onboarding to Salesforce for their personalized email communications. However, with limitations like daily email caps, they quickly ran into problems with this platform.

Let's understand how MassMailer helped Vulcan navigate the complexities of personalized bulk email.



The Challenges

Several challenges made it difficult for Vulcan to continue using Salesforce in its own capacity. Here are a few:

Legacy System Limitations

Salesforce lacked the personalization capabilities that Vulcan needed for its mass mailing campaigns. The daily email limits were slowing Vulcan down and causing problems with the absence of a blind-copying feature for emails and compliance record maintenance, which were necessary for operational integrity.



The MassMailer Solution

MassMailer, a Salesforce-native email solution, helped Vulcan navigate these challenges with the following features and capabilities:

Email Capacity and Personalization

MassMailer eliminated the daily and batch email limits imposed by Salesforce that allowed Vulcan to send unlimited campaigns to lists of contacts and prospects without any technical barriers. They could send attachments with the bulk emails as well.

Furthermore, flexible sender options enabled them to customize emails as if coming from individuals instead of a common company account. This personalization was central to Vulcan's business model.

Operational Efficiency and Personalisation

Vulcan needed to send high-volume emails containing "state of the union" calls, holiday greetings, save-the-date notifications, and targeted communications. With Salesforce, these emails kept losing a personal touch because of an underwhelming email segmentation process. Furthermore, it was not possible to make the emails appear as if coming from individual relationship managers.

The workflows for onboarding were more complicated and time-consuming after the migration from ACT CRM.

Template Builder and List Management

MassMailer's drag-and-drop email builder empowered Vulcan to flexibly create and update templates without knowing a single word of HTML. It significantly reduced campaign setup time and helped simplify the content editing process.

Vulcan used the list management tools within Salesforce to segment, update, and target their communications with higher efficiency, working with MassMailer. They could efficiently manage quarterly and annual meeting invitations, global client calls, newsletters, and commentaries.

Automated Tracking and Compliance

Vulcan was able to efficiently monitor email deliverability, open rates, clicks, bounces, and unsubscribes with MassMailer's detailed tracking features. The platform automatically logs and does reconciliations of sent and received messages, which helps respect regulatory requirements while enhancing internal controls for Vulcan.

Easy Onboarding and Ongoing Use

MassMailer has a user-friendly interface, which allows Vulcan's client service team to quickly adapt to the new solution. There was no need for dedicated training to understand campaign management or use features like Email Wizard, reusable templates, real-time analytics, etc., improving tool assimilation.



MassMailer: Enhancing Email From Within Salesforce

Ever since Vulcan adopted MassMailer, they have been able to drastically improve their client outreach and achieve efficient, personalized, and compliant bulk email workflows.

Features like unlimited email capacity, campaign management, real-time monitoring, and personalization from within Salesforce made the transition easier. Vulcan can now nurture institutional relationships, maintain high operational standards, and support its company's ongoing growth.

You can also bridge your legacy technology challenges by implementing MassMailer directly into your Salesforce systems.

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



Arti Devaki
CEO

📞 +1 (408) 480-7334

✉️ arti@massmailer.io

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



Siva Devaki
Co-CEO

📞 +1 (650) 248-7958

✉️ siva.devaki@massmailer.io

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

**MASS
MAILER**

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