



How OCP Capital Uses MassMailer for Salesforce to Drive Institutional Investor Engagement

Discover how OCP Capital uses MassMailer for Salesforce to reach institutional investors, track engagement, and generate qualified leads

OCP Capital LLC, a US-based FINRA-regulated placement agency, was in a unique situation. They connect clients with investors like family offices, endowments, and foundations.

But their existing CRM, Salesforce, has limitations that prevent the firm from reaching its outreach target volumes.

They needed a reliable way to send, track, and refine mass email campaigns, and MassMailer helped them do just that.

The Challenge

Before MassMailer, OCP Capital relied on Outlook and other basic email tools. While these platforms allowed for group emails, they lacked tracking and compliance features.

According to George Rudman, a representative at OCP Capital, *"It was difficult to know who was opening emails, who was clicking, and who wasn't interested. Without that insight, you risk either spamming contacts or missing out on warm leads."*

Other challenges included:

- * No way to automatically process unsubscribe requests.
- * Difficulty spotting when contacts changed jobs and emails became inactive.
- * Limited ability to integrate outreach activity into Salesforce CRM. For a business where long-term relationships are everything, OCP Capital needed a Salesforce-native solution that could scale outreach without sacrificing professionalism.

The Solution: MassMailer

OCP Capital integrated MassMailer into its existing Salesforce setup, making it a core part of its marketing and CRM workflow. Their marketing and relationship teams now use the tool to:

- * Send targeted campaigns to lists of institutional investors who are likely to be interested in a specific strategy.
- * Track all email history inside Salesforce to maintain a single view of each relationship.
- * Flag inactive or outdated contacts when campaigns bounce, ensuring data remains accurate.

Metrics tracked include:



Opens and clicks: signals for follow-up calls



Responses: direct leads for meetings or calls



Bounce-backs: indicators of job changes



The Results

Post MassMailer's adoption and use, OCP Capital:

- ★ Improved lead generation by identifying engaged prospects more quickly.
- ★ Reduced wasted effort by automatically removing uninterested or unsubscribed contacts.
- ★ Strengthened their Salesforce database with cleaner, updated contact information.
- ★ Created a repeatable campaign process that supports ongoing fundraising and marketing.

George summarized the value clearly: *"MassMailer is one of the primary building blocks of our outreach. It helps us generate leads, and combined with follow-up calls, it leads to real investor meetings."*

Feedback & Recommendations

While OCP Capital values MassMailer, George noted that it comes with a learning curve. *"It's not something you can just pick up in five minutes. You need to understand how to build templates. But once you do, it pays off."*

He also expressed interest in seeing AI-powered features integrated with Salesforce, such as:

- ★ Optimized send times based on recipient behavior.
- ★ Content suggestions for drafting personalized emails.
- ★ Smarter data validation for contact accuracy.

Despite these areas for growth, George strongly recommends MassMailer: *"I can't see why anyone else in our industry wouldn't use it. It's core to how we work."*

Key Takeaways

Targeted outreach matters: Sending bulk emails is not enough; you need to track who engages, so your team can focus calls on interested prospects.

Clean data drives results: Bounce-backs and unsubscribes are automatically addressed, improving list accuracy and helping you spot job changes and keep relationships current.

Learning pays off: While there's a setup curve, once you learn to build templates and manage campaigns, MassMailer will become a primary building block of your outreach.

Conclusions

OCP Capital's experience shows how MassMailer can become integral to relationship-driven industries where trust and timely follow-up make the difference. Its core benefit, the capability to send mass campaigns from within Salesforce, speaks for itself.

If you are a firm that relies on Salesforce CRM, MassMailer offers an effective way for marketing, sales, and operations teams to manage campaigns en masse from within Salesforce. It allows you to send unlimited emails, track engagement, run drip campaigns, and conduct targeted outreach from within Salesforce.

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