

Scaling Marketing Emails: How RPOA Leverages MassMailer

POA, a retirement investment planning company, relies on MassMailer to scale up its marketing emails. Read the case study to understand how.



**Retirement
Planners
of America**

Overview

Retirement Planners of America is an SEC-registered retirement advisory firm that works primarily with individuals who are retired or nearing retirement. The experts help with managing client investments such that their nest eggs (life's savings) can serve them well in their golden years.

The firm also helps clients devise proper utilization strategies that allow them to maintain their chosen lifestyles throughout retirement.

This case study highlights how MassMailer helped RPOA with scaling its marketing emails efficiently.



The Challenges

RPOA publishes a weekly newsletter that is sent to over 9,000 individual clients and prospective clients every Friday. They had been using Salesforce Marketing Cloud to create and broadcast these marketing emails.

Relative to the scope of RPOA's usage, the cost of Salesforce Marketing Cloud was disproportionately high. They realized that the tool was over-equipped for handling the kind of marketing tasks that RPOA was using it for, including the countless features that they neither required nor used.

As a result, Salesforce Marketing Cloud ended up being a financial drain for RPOA, as they were unable to utilize the tool to its full capacity. This led RPOA to look for alternative solutions that would integrate more easily with their systems and were flexible enough to scale according to their requirements.

MassMailer proved to be the ideal solution that RPOA had been searching for, in many ways.

The MassMailer Solution

MassMailer helped RPOA in eight major ways in overcoming the challenges created by Salesforce Marketing Cloud:



Native Salesforce Integration

MassMailer is a Salesforce-native tool that allows RPOA to send emails from any object in Salesforce. They could also create their own list views without needing to export data or manage it externally.



Scalability and Ease of Use

The switch to MassMailer made the process scalable for RPOA. They could easily teach the ropes to their team with its straightforward and friendly UI and structured workflows, which also made the onboarding easy.



Domain Reputation and Deliverability

MassMailer's built-in features, such as suppression records for unsubscribes and email deliverability tools, helped RPOA maintain a good domain reputation.



Separation of Domains

RPOA uses multiple sender domains for clients and prospects. With MassMailer, they were able to make a clear distinction between emails sent from different roles. This helped them manage targeted communication and minimize reputation risks.



Automated Compliance

MassMailer's (largely) automated suppression gave RPOA peace of mind regarding compliance.



User Roles and Visibility

The platform enables monitoring by read-only users, providing the frontline staff with enough visibility to handle client communications effectively.



Event and Campaign Flexibility

RPOA was able to segment communications according to specific events with MassMailer. This enabled them to track engagement at a granular level with opens, clicks, and other KPIs.



Reliable Support vs Salesforce

RPOA was struggling with the slow support system of Salesforce. This was solved by MassMailer's direct integration into daily workflows, ease of management, and hands-on support when required.

MassMailer: Simplify Your Email Workflows

MassMailer is a Salesforce-native bulk email platform that integrates seamlessly to enhance your email marketing functionality and capacity.

It offers super-useful features like Salesforce campaigns, bulk emails beyond daily limits, a friendly UI email wizard, campaign result monitoring, email verification and templates, and more! They help you simplify your email workflows from within Salesforce.

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



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