



Date: 2017, Q2

## What is New

E-mail integration with Salesforce has always been a major headache for most of the Salesforce CRM users. AppCrown clients are no exception to this. The Salesforce provided “Salesforce for Outlook” app works 50% of the time. We have heard lots of complaints about Outlook crash or freeze when the app is running in Outlook. Then, what is the answer to this critical business need?

Salesforce has recently announced a paid subscription app (InBox) also known as “SalesforceIQ” that ideally would solve the problem. The issue is that it is costly to have. At the price tag of \$25 per user per month, many users will elect to live with the not-working-so-well Salesforce for Outlook app.

In order to help AppCrown clients achieve the maximum ROI on your Salesforce, we have contracted with Cirrus Insight, the provider of Outlook/Gmail to Salesforce integration app, to give you the lowest price possible. Instead of the \$29 per user per month charge (Closer Edition), you will only pay \$15 per user per month. If you are interested in learning more about how the integration will make your Salesforce a total success to your business, please register for the AppCrown Solution Demo every Friday at 4:15 pm.

[Click This Link to Register for the Webinar](#)

## Successful Business Use Case

Wealth Plus is not only a great CRM, with many Salesforce built-in functions and AppCrown add-on functions, but also a great database system that can eliminate many spreadsheets that you are probably still maintaining even after years on the AppCrown solution. We have heard from our clients that they are using excel spreadsheet to maintain key client or financial account related data because they thought it is difficult to put them on Salesforce.

Recently, we have worked with a client who decided to expand the Financial Account object that AppCrown uses every day to upload account balance data. Additional fields such as billing fee schedule, risk tolerance, investment time horizon, & etc. are created to help the firm keep track the key data that are not kept by the custodian. These fields are already created in the Contact object as part of the AppCrown Wealth Plus solution. You can create additional formula fields to check if the fields in the Contact object aren't the same as the fields in the Financial Account objects. Finally, you can generate exceptional report to let you know the exceptions when you are talking to the client.

This type of “database” use is a perfect example of how you expand the use of Salesforce helping you manage your business with ease.

## What's In the Future

Over the past 12 months, we have been actively developing a DOL Risk Monitoring solution. The solutions leverage your financial account profile existed in your back-office system to establish a client risk score. We use 3 key elements (age, investment time horizon, and risk tolerance) to determine the risk score. We then take all the retirement accounts and match the holdings with the Morningstar Star rating. With the holding Start rating, we can compute the retirement account weighted risk score. By comparing client risk score with the weighted financial account risk score, we can identify clients with retirement accounts that may need your personal attention. With this system, you can safely tell your clients and the regulators that you have a system in place to support the concept of “best interests”. If you are interested to learn more about this new solution, please contact Ted personally ([ted.tsung@appcrown.com](mailto:ted.tsung@appcrown.com)).

One item that I want to mention is the collaboration of AppCrown with Client4Life. Client4Life is a business entity that specializes in campaign & client calling outreach services. Imagine you outsource your prospect calling and mailing follow-up to a business entity that knows how to talk to your clients and work for you to bring qualified prospects into your office for a face-to-face meeting. To learn more about this incredible service, please read the ads from our partner below and make sure to look at the video link and visit their website (<http://www.client4lifems.com>). For our part, we have developed a special data integration tool set to support the tracking of campaign results and actions back to your Salesforce instance.

## How to Maximize Your AppCrown Solution

This year marks the 11<sup>th</sup> years that I have been developing the Wealth Plus solutions on the Salesforce platform and working with clients to maximize their use of Salesforce. I am sad to say that most of the clients are still using Salesforce as an efficient data storage system instead of an effective business system. One question that I often ask my clients to tell me about their use of Salesforce is – are they using the Service Monitor to keep track of their interactions with their clients. The usage of the Service Monitor across our client base is less than 5%. This is a strong indication that most of the advisers are still working on a model that is not based on measurement. The use of big data is clearly lacking in this industry.

If you want to learn how to take advantage of your system to the max, then please email me and set up a meeting to discuss how you can leverage what you already have and find out if you can grow your business without spending more IT money.

## Technology mentioned in this newsletter

Cirrus Insight (<http://www.cirrusinsight.com>) – Outlook/Gmail Integration with Salesforce.com

Client4Life (<http://www.client4lifems.com>) – Campaign & Client Calling Service Outsourcing

DOL Risk Management Solution (<http://www.appcrown.com/dfcs>) – Supporting your “best interests” requirement

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From Our Partner – Client4Life

Client 4 Life

*"The new foundation for practice success"*

Over the years, like you, I have seen a lot of programs and tools designed to help advisors sell more or run their practice. Honestly, most don't live up to the hype. Recently, I was shown a system that I believe can truly transform your practice and your life.

Please take a look below.

**Does your practice operate like this?**

- ✓ I have a full calendar of qualified appointments
- ✓ There is a dedicated team to help me and my administrative assistant develop deep and meaningful relationships
- ✓ I send frequent and effective quality touch communications to every client and prospect in my book
- ✓ All my top clients are consistently scheduled for reviews
- ✓ Each day I have 30% more time to focus on what is important to me

**If so, was this the result?**

**Average production increase, 176%!**

If not, you should consider The Client 4 Life Management System™, a team-based approach.

With an impressive eight-year track record, Client 4 Life is the new foundation for practice success, and helps an advisor stay organized, sell more, work smarter, and achieve a balanced lifestyle.

Trust me when I say, you've never seen a system like this!

[Click This Link](#) to see a 3-minute video to learn more!