

CASE STUDY



Ziegler

The Ziegler Companies, Inc (Ziegler). [OTC: ZGCO] (www.ziegler.com) is a growth-oriented investment banking and investment services firm with a primary focus on the healthcare, senior living, and church and school sector. Ziegler Wealth Management provides investments and advice for individuals, families, business owners and institutions nationwide.

Challenge

Ziegler was not a salesforce.com user. The firm's key challenge was to improve client service and sales effectiveness by safely integrating client data into an efficient and easy-to-use client relationship management (CRM) system. Ziegler felt that by better automating the data integration process, its associates would be able to provide faster, more effective service for their clients. Additionally Ziegler's management team would have better access to reporting that would allow for faster and more accurate analysis of the firm's overall business.

Solution

The highly customized front-end solution has enabled the firm more cohesive access to client information allowing them to better serve their clients. The comprehensive reporting system allows Ziegler's management team to track key business metrics such as assets under management, leads and conversion ratios at every level of the firm.

Benefits

The highly customized front end solution has enabled the firm to generate a comprehensive reporting system used by its senior management empowering it to easily track AUM, fees, leads and conversion at every level of the firm.