



Griffin Capital

Griffin Capital provides investment management services to customers. The need for a system to manage customers and communication topped the priority list, as the company desired growth.



Solution Required

Storing personal details and other important customer information on spreadsheets couldn't serve the growing needs of Griffin Capital anymore. A more robust solution was required.

The company distributed weekly investment emails to customers. These emails lacked structure and branding. It was also a challenge to understand the delivery rate of the distributed newsletters. Emails were sent, but delivery couldn't be tracked.

The senior management of Griffin Capital approached Plannerdale, in pursuit of an affordable CRM solution. The Plannerdale team discussed with Griffin's team to understand the company's challenges, and CRM requirements.

New Experience

Griffin Capital selected Plannerdale CRM for its customization, central contact management,

and the ability to send out branded personalized emails.

Griffin believed that utilizing the Plannerdale CRM tool will improve the entire process of communicating with customers.

Using Plannerdale, Griffin now composes weekly emails conveying investment related advice and recommendation to customers. These emails are delivered to recipients in a branded and personalized format. The system also keeps a history of sent emails, highlighting who has read the messages.

The personalized communication solution rests on the central address book which Griffin uses to capture and manage the contact details of customers and other important contacts.

Seamless Solution

"Plannerdale's user-friendly CRM has provided Griffin Capital with a seamless communication solution that helps to compose personalized messages to customers. It is also a great benefit that we can track who has read our messages so we understand the impact our investment updates are having on our customer base. Managing our customer base has also been simplified, using a central database to capture customer details. We started with 100 customers, and we are already growing towards a 500 customer base, with Plannerdale's contact management feature."

Tobi Asu, CEO

Expectations

Surpassed

"Plannerdale has definitely surpassed our expectations at Griffin Ltd. The system supports us through our growing customer base proving Plannerdale to be a future partner for the company."

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