



ROCKSTEAD


G R O U P

Rockstead Group

INDUSTRY

RockStead Group › Financial Services

Yabber › Artificial Intelligence

SPECIALTIES:

Review Services: Independent asset, business process review

Yabber: Client interaction and analytics using AI and human insight

COMPANY SIZE:

SMB

WEBSITE:

www.rocksteadgroup.com

Erik Bergstrom
Chief Compliance Officer (CCO)

Rockstead Group

The Rockstead Group is an interesting company, operating in two different business arenas. Review Services is an independent asset, business, and process review company established in 2008. The company provides a range of services, across all asset classes, to businesses involved in the financial services market.

The other, more recently established side of the company is Yabber, a software platform that provides client interaction and analytics using the perfect marriage between artificial intelligence and human insight.

“We would definitely recommend Pipeliner to other companies, The company has been fantastic to deal with, has addressed all our issues, and has presented the product to us in such a way that all our key issues are really addressed—not a bunch of other things that we’ll never need.” Erik Bergstrom, CCO of Rockstead



Two Very Different Businesses — One CRM Solution

The fact that Rockstead Group operates two very different business lines meant that they required a flexible CRM solution that could accommodate both.

“On the Review Services side, we use Pipeliner to track deals from initial phone call to finalization,” explains Jeremy Hill, analyst for Yabber and project manager for CRM installation and operation for both businesses. *“This means everything from first chats with clients, to when projects actually lift off and go over to the operations team. Project leaders are assigned, contractors are hired, and then all the way to invoicing and completion.”*

Rockstead is a service with a limited time frame, usually delivered in a few weeks or months, for clients that frequently return.

The Yabber side is quite different. *“For Yabber, once we get a client onboard, it’s an ongoing revenue source,”* says Erik Bergstrom, Rockstead CCO. *“There is no end to it. The purpose of using Pipeliner is to make sure that you constantly engage with the client and make sure that the volumes of calls and interactions to be analyzed continues and continues to grow.”*

“For myself and my colleagues on the executive team, the reporting and being able to view sales activities has been great,” Bergstrom says. *“It adds clarity for the executives.”*

Understanding Unique Challenges

A prime reason for Rockstead’s choosing Pipeliner was that the Pipeliner team truly helped address Rockstead’s issues—something other CRM vendors weren’t doing.

“While we were looking for a CRM solution, other vendors didn’t really listen to what our needs were,” Bergstrom explains. *“For example, we didn’t want to go for a massive corporate solution that would cost a fortune. In the end, when it comes to CRM, one of the challenges is to get the staff engaged using it on a continuous basis. If you don’t, you’ve wasted a lot of money. With so many features that we’d never use, this wasn’t going to happen”.*

“When we talked to the people within Pipeliner, they wanted to understand the unique challenges that we had. They then worked those challenges when they presented the product to us.”

“The product demo actually made a lot of sense,” adds Hill. “Even if it wasn’t polished, as a demo it made sense. For the other CRM demo systems, from my point of view, I couldn’t really make out how they were going to fit it in, and how it was going to work. With Pipeliner we could see the potential of building on it.”

“In the end, Pipeliner has a great mix of visual user interface and supportive and clearly articulate trainers when it comes to how things work,” Bergstrom says.

Beyond Just CRM

Bergstrom explains that Pipeliner goes well beyond a CRM. *“It’s not just a sales tool—it can be used by operations as well. If you extend the sales process steps beyond the close of the deal and add on the next identified steps for operations, you have a tool that others can use as well to make sure everything is on track. So for us, it’s not just a sales tool—it also improves the structure and rigidity of the ops side.”*

Interestingly, they hadn’t thought of using a CRM this way until they were actually evaluating it.

“After you start drilling down into different solutions, and you identify one that works, you can then learn how that tool is actually operating,” Bergstrom says. “On the Yabber side, we’re always thinking outside the box a bit, so we try to get as much as possible from the tools we acquire—use them in more than one way. Using Pipeliner for ops wasn’t our intention in the beginning, but it was something that came as we understood the system a bit better.”

Marketing Tool

“Pipeliner has also been unexpectedly useful for a marketing purpose as well,” Hill says. “We’ve used it to centralize a huge contact list, and then control and update it.”

“We send focused emails to our clients,” Bergstrom adds. “We don’t do broadcasts—we do niched emails. Our message isn’t some flashy picture, it’s insights. We never send out 200,000 emails, they’re quite focused. So Pipeliner works very well for us.”

Recommending Pipeliner

“We would definitely recommend Pipeliner to other companies,” Bergstrom concluded. “The company has been fantastic to deal with, has addressed all our issues, and has presented the product to us in such a way that all our key issues are really addressed—not a bunch of other things that we’ll never need.”

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Pipeliner CRM

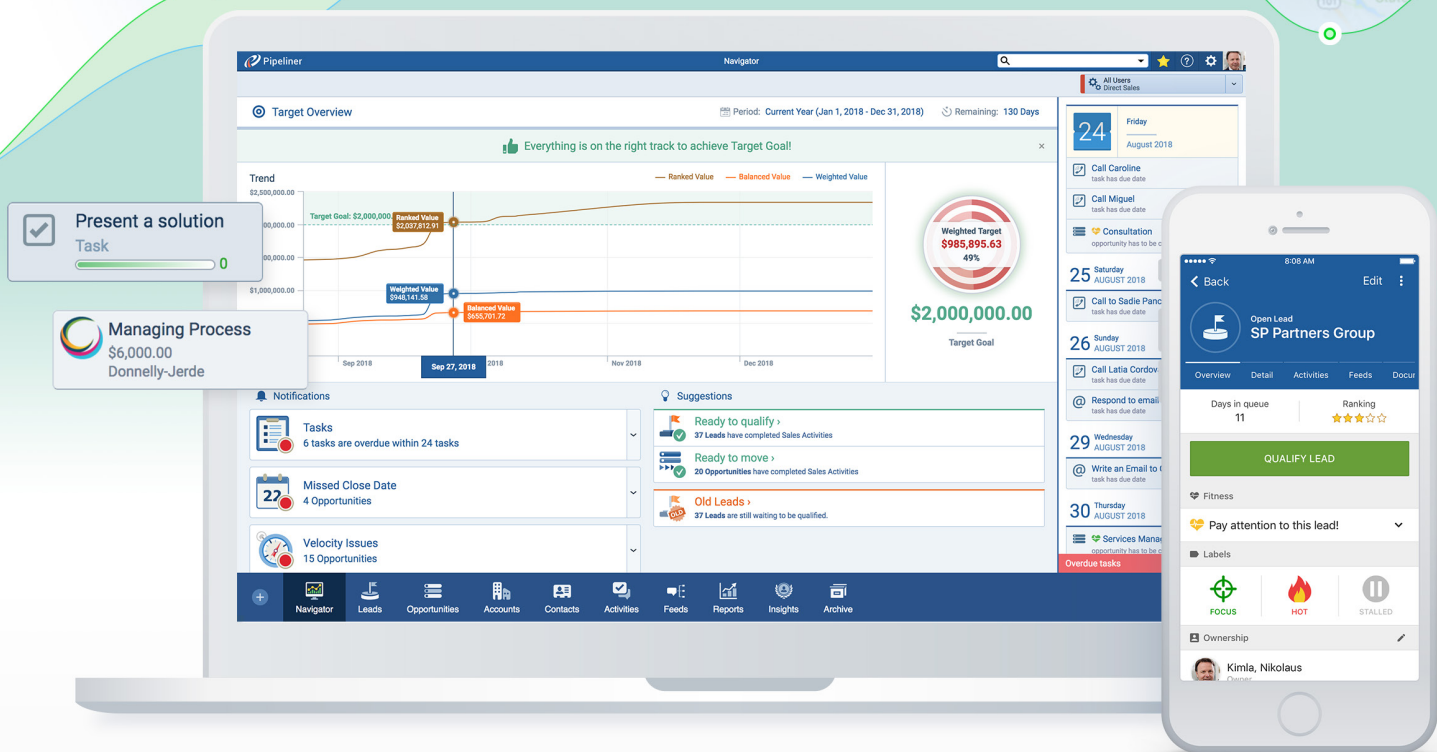
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