



## A Los Angeles-based Investment Firm :: Case Study

888.927.4341  
www.sminnovations.co  
hello@sminnovations.co



### About Our Client

Our client is a Los Angeles-based investment firm that focuses on opportunistic investing in special situations, including distressed and defaulted credit opportunities in the municipal marketplace.

### Challenge

- Our client was not getting maximum value from Salesforce due to bad investor and entity data, inaccurate account hierarchy, and ineffective investor marketing lists.
- They needed to revamp their Account, Contact, Opportunity objects, and create a new DocuSign template to match their business processes.

### Solution

- SM Innovations aligned the account hierarchy and added custom fields to capture mandatory information on investor records.
- SM Innovations created 5 custom reports to track relevant investor information.
- SM Innovations generated an automated DocuSign template, since the client was not using the DocuSign integration previously.

### Outcome

- The account hierarchy restructure allowed for much more insightful reporting, giving the client much-needed visibility into to their Salesforce data.
- With one click, the client can now create a DocuSign template that populates a document with all relevant investor information from the appropriate Salesforce objects.

*"The team was very good at understanding our needs. They were able to translate what we needed into Salesforce outcomes. Would work with them again!"*

**- Client's Director of Business Development and Investor Relations**

### About SM Innovations

SM Innovations is a Salesforce consulting partner company based in Los Angeles. We are a tenacious group of ex-IBM digital strategy consultants, world class engineers, and highly talented designers, who set out to do what we love most – build premier quality, robust Salesforce applications. We pride ourselves on providing enterprise-level professionalism and delivery for every client and strive to build long-lasting relationships driving continuous success and innovation.