



Ascensus Accelerates Speed-to-Market with Real Time Insights

Ascensus helps more than 10 million Americans save for retirement, college, and healthcare with premier service and technology.

While they've been successful in offering tailored solutions that meet the needs of asset managers, banks, state governments, employers, and individuals, they were also interested in improving sales efficiencies and engagement with prospects as they continued to scale. By partnering with InsideView, they gained a more holistic view of their target accounts, enabling them to accelerate time-to-market.

“ InsideView's data triangulation gives us a transparent view into which prospects we should target. Not only do we get deep insights within a particular contact, but within the company too, giving us a much wider view into who we're selling to. Having all this information seamlessly available at our fingertips empowers our sellers to help drive our strategic growth strategy.”

Dan Madden, CRM Program Manager, Ascensus

ASCENSUS CHALLENGES

Gaining insights into a historically private industry

Increasing CRM adoption

Improving sales efficiencies

RESULTS USING INSIDEVIEW

Expanded breadth of contacts and depth of insights in targeted accounts for more relevant engagements

Increased adoption of Microsoft Dynamics 365, their enterprise CRM platform

Reduced time spent on industry research with key insights integrated in CRM



Ascensus accelerates sales and increases CRM adoption

Ascensus was interested in improving prospecting efforts and gaining a more holistic view of their target market. While launching various online CRM environments, they turned to InsideView for accurate company and contact data in their target accounts to help better identify new market opportunities. Access to industry research and key insights has enabled the sales team to increase engagement with prospects, and they continue to rely on MS Dynamics 365 as their single source of truth.

Seamless integration saves time for sales teams

Ascensus leverages InsideView's real time data from 40,000+ public and private sources to accelerate sales through more relevant engagement. The seamless integration with MS Dynamics 365 saves the sales teams hours of research time, and Ascensus has increased their speed-to-market with news and social insights for more relevant conversations with prospects.

Increased adoption of CRM, greater return on investment

The sales teams at Ascensus rely on MS Dynamics 365 CRM as their single source of truth. With data aggregated and readily available in their CRM, the sales teams rely on MS Dynamics 365 not only for forecasting, reporting, and compensation, but also for a transparent view across accounts, contacts, financials, and insights. With greater usage and adoption in CRM, Ascensus sees an increase in sales efficiencies, ultimately leading to increased revenue.



“Our sellers now save a tremendous amount of time as industry research is now embedded within our CRM — a true competitive advantage for any seller in any industry. The ability to dig deeper into the relationships with our prospects, and even clients, speaks volumes to the InsideView solution.”

Dan Madden

CRM Program Manager,
Ascensus

LARGEST

independent retirement
and college savings services
provider in the U.S.

FOUNDED IN
1975

\$261 BILLION+
IN ASSETS
under administration*

3,300+
EMPLOYEES*

Headquartered in
DRESHER
PENNSYLVANIA

2019 Retirement Leader of the Year
Fund Intelligence Mutual Fund Industry Awards

The InsideView Advantage

InsideView helps businesses drive rapid revenue growth by empowering business leaders to discover new markets, target and engage the right buyers, and manage customer data quality. Our AI-based B2B data and intelligence platform delivers the industry's most relevant and reliable buyer signals and, combined with InsideView's data expertise and best-in-class customer support, is trusted by the world's best performing companies.

For more information, contact us at www.insideview.com

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