

FINANCIAL CRIME PARTNERS



Company

Financial Crime partners

Industry

Financial Consulting

Use Case

Collaboration for a Lean Startup

Twitter

[@FinCrimePartners](#)

Site

[fincrimepartners.com](#)

Blog

[fincrimepartners.com/blog](#)

CASE STUDY

Financial Crime Partners: Google Apps and Nimble Help Resolve a Lean Startup's Growing Pains

About Financial Crime Partners

Financial Crime Partners is a firm of consulting practitioners in the financial crime space. They advise customers about physical security, information security, fraud prevention, anti-money laundering, and compliance issues. The team, practicing related disciplines, is geographically distributed along the East Coast of the United States.

Finding a Path to Efficiency and Productivity

“Early on, we were running into efficiency and productivity roadblocks in terms of our own workflows, and managing access to information and documentations for everyone on the team was difficult,” says co-founder Josh Burdett. “The traditional

whiteboard in a conference room was not an option for us.”

“What worked for us was being able to collaborate through Google Apps. We make extensive use of the email platform, Google docs, calendar syncing, spreadsheets, and apps like Nimble to help us plan and execute more effectively.”

“We needed a CRM and relationship management platform that gave us that same ease of use. We needed straightforward software, cloud based and easy to use—a system that was not bloated with features we didn’t need, and one that was affordable for our lean business. That platform was Nimble. Like many organizations with a web presence, we use Nimble to capture and track content-based marketing leads, to track and

Josh Burdett
Co-founder
Financial Crime Partners

“We needed straightforward CRM software, cloud based and easy to use—a system that was not bloated with features we didn’t need.”

manage outreach, and to warm up prospect relationships.”

Josh Burdett also has a cost conscious sensibility:

“I was a CRM consultant when CRM was new, when client-server apps were hundreds of dollars a seat. I’ve long been a proponent of the holistic view of the customer. In today’s world of social business, it’s important to follow up and provide content in a timely and relevant way. Nimble provides tracking and logistics that used to be ridiculously expensive for a low monthly fee. It gives us the fundamental features that put the “R” in Relationship Management.”

Positive Changes from Integration

Rick Mercuri, another Co-founder: “We make good use of several Nimble features in our workflow. We Tag contacts, we use segmented lists. Since we know the kind of customers who are in our sweet spot, we can

find them with Nimble social search tools. We find the LinkedIn integration particularly helpful. We use the tagging feature to track and distribute these prospects among our team.”

“Everything is in one place, tied to Google Apps and email. We can see the history and schedule next steps.”

Josh: “We moved from a cumbersome organizational system of emails to a much more streamlined workflow. Now we spend a lot less time chasing and verifying whether a task has been completed, what next steps are required, the status of a deal in the pipeline. We can just look at a contact and see immediately what’s happening.”

“With Nimble, it works both ways. When something doesn’t happen on schedule, we get reminded by Nimble. Because of that, we always know where we are and we save time.”



“When a prospect reaches out, we can see on their contact record whether or not anyone on the team is already connected to them. Then we can move to assign the outreach to that team member. So we’re able to move more quickly through the sales funnel—and enter the relationship already ‘warm.’”

Rick: “Recently, for example, someone signed up for a white paper. We tagged them in Nimble and were about to send a generic email when we noticed that someone on the team was connected through LinkedIn. Instead of a bland first contact, we made it much more personal by assigning the outreach to the prospect’s LinkedIn connection on our team. The relationship moved more naturally and quickly through the funnel.”

Quantifiable Results

One of the company’s partners calculates that they have seen time savings of 50% over the pre-Google Apps days. Weekly team meetings dropped from hours to minutes. By presenting to the group as a whole we are much more efficient in collaborative development of ideas.

Marketing and Sales

Now that the team’s marketing efforts are more focused, they’ve honed their prospect wish list and are able to identify cross-sell opportunities more easily. We are closing deals based on these new capabilities—using Google Apps and Nimble to be cross-disciplinary and collaborative.

Rick: “Through the integration of Nimble

with Google Apps, we can get on a call, collaborate, focus, and brainstorm—on the same document—and have that document ready to go in an hour. We’ve all remarked that this would have taken much longer before Nimble.”

“As a startup everybody does a little of everything. Even though every job is different, we’re much more productive in terms of outbound calling. We can all see exactly how many calls we have, who we need to stay in touch with—Nimble keeps us on track and focuses our time.

Easy Adoption

“Our team really took to Google Apps and to Nimble. Adoption was easy. Nimble adoption was as simple as a team walkthrough meeting. It’s easy to use and easy to understand. Google Apps and Nimble were both game-changing additions to the business.”