



IVORY

Allegiant Partners

Allegiant Partners chooses SuperTRUMP EXPRESS for Salesforce to achieve significant processing efficiencies

As more and more business functions move to the cloud there are new opportunities for companies to simplify and streamline their workflows and systems. Allegiant Partners has always been a leader in leveraging technology which is why they chose SuperTRUMP Express for Salesforce for integrated pricing of leases and loans. Using SuperTRUMP Express for Salesforce lets them work directly within Salesforce to accelerate customer service, make better business decisions, and increase employee efficiency.

Situation

Like many companies, Allegiant Partners is on the lookout for ways to be more efficient and better serve their customers. As an independent finance firm, they use innovative methods to provide capital to growing businesses. Their unique focus is on providing fast, flexible, and competitive financial solutions for equipment acquisitions, and they leverage technology to make this happen.

The Company uses Salesforce as their enterprise customer relationship management (CRM) system giving them a central location for all of their customer's information. Until recently, they had multiple business systems, which resulted in inefficiencies that impacted their ability to grow.

Complication

In a highly competitive and rapidly moving financing market, Allegiant needed a better way to serve their customers. Salesforce was their system of choice for customer management and it made sense to integrate other business functions, such as pricing, into that system so that all customer data was available in one place.

Allegiant Partners initially evaluated TValue™ software but found it did not have a feasible solution for Salesforce integration. "We could have built our own solution but it would have been costly, and we're not in the coding business," said Raquel O'Leary, Senior Vice President of Operations at Allegiant Partners. "We wanted a straightforward pricing solution that would help us be more agile without changing our existing business practices."

Solution

As part of their systems overhaul, Allegiant Partners took on a major project to streamline and build out capabilities in Salesforce. Pricing was an important part of this effort and after hearing that Ivory may be able to help, Raquel reached out to Ivory Consulting's CEO, Scott Thacker, to explore options. Ivory Consulting had just released SuperTRUMP EXPRESS for Salesforce and was excited to work with Allegiant Partners to test the new solution within their infrastructure.

Learn more

Solution overview



Product

SuperTRUMP Express for Salesforce

Industry

Financial services

Organization size

Small

Find out more

[SuperTRUMP Express for Salesforce](#)
[On the Salesforce App Exchange](#)

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Raquel O'Leary

Senior Vice President of Operations

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“Ivory Consulting was great to work with. We had a direct line to their product team to help us through implementation,” said O’Leary. Allegiant Partners began testing the solution in July 2015 and rolled out the initial deployment in September. A full deployment will start in October and be complete by the end of the year.

SuperTRUMP EXPRESS for Salesforce lets Allegiant Partners price leases and loans within a controlled profile and have that pricing included as part of the customer documents. There is a high level of accuracy and detail because manual calculations, re-keying of data and work within auxiliary systems are eliminated.

The Allegiant Partners team was able to deploy their new pricing solution quickly. It took just over an hour to install, and the solution was intuitive enough that everyone was able to use it with little training.

Benefits

Accurate pricing

With pricing integrated into Salesforce, Allegiant Partners can get more deals through their pipeline with a higher degree of accuracy. Employees no longer have to use calculators or look for pricing sheets outside of Salesforce. Everything is centralized within the customer opportunity.

Efficiency

In order to continue their growth trajectory, Allegiant Partners needed to increase their team’s efficiency. By allowing employees to work within one system, SuperTRUMP EXPRESS for Salesforce increases each employee’s efficiency.

Company-wide consistency

Allegiant Partners’ customer relationships are strengthened as they deliver a consistent experience at each touchpoint. “SuperTRUMP EXPRESS for Salesforce gives us instant, company-wide access to pricing data anywhere, anytime,” said O’Leary. “This allows every employee to have the same information no matter where they are located so customers get answers quickly and accurately.”

Data insights

With instant access to reports and insights across their entire organization, Allegiant Partners increases financial transparency to minimize risk and accelerate compliance. Integrity and transparency are part of the company’s core tenets and the new solution allows them to fulfill this promise.

“We plan to double our business in the next two years and now we have a platform and pricing solution that helps us maintain high levels of customer service and high ethical standards as we grow.”

Raquel O’Leary
Senior Vice President of Operations
Allegiant Partners

About Ivory Consulting

For more than 30 years, Ivory Consulting Corporation has been the leading provider of equipment lease and loan pricing software and consulting services for the equipment finance industry. Ivory’s flagship product, SuperTRUMP, is the industry standard for pricing and modeling complex leases and loans and trusted by four of the top five Monitor 100 companies. Ivory is privately held and headquartered in Walnut Creek, California. For more information, visit www.ivorycc.com.

About Allegiant Partners

Established in 1998, Allegiant Partners is a unique and independent finance firm that is not afraid to use its capital to help small-to-medium sized businesses grow to their full potential. With a focus on providing fast, flexible, and competitive financial solutions for equipment acquisitions, their team is well regarded and well connected in the equipment finance industry, and has a reputation for agility, transparency and high ethical standards. Allegiant Partners is currently privately held and headquartered in Walnut Creek, California. Learn more at www.allegiant-partners.com.