



# SuperTRUMP for Salesforce

## Wintrust Commerical Finance – Case Study

### SUPERTRUMP FOR SALESFORCE

SuperTRUMP is trusted by seven of the top 10 Monitor 100 companies and 19 of the top 20 Monitor banks, and many of these companies have also adopted Salesforce® CRM. To remain competitive in the data-driven environment of 2022, lessors need to attain a single, unified view of their customers to achieve cross-functional insights and ensure consistent pricing and performance metrics across the organization. A unified view also supports automating the flow of data to streamline the quote-to-fund process. These capabilities are the unique value provided by SuperTRUMP for Salesforce. Any lessor or lender who uses Salesforce can use SuperTRUMP for Salesforce.

### WINTRUST COMMERCIAL FINANCE

Wintrust Commercial Finance (WCF) is Wintrust Financial’s Texas-based, equipment-focused financing group offering sophisticated lease and loan products across numerous verticals – transportation, construction, technology, medical, energy, aviation, and more – to companies throughout the United States. Within three years of its founding and using SuperTRUMP to model and price equipment leases and loans, WCF funded more than \$1 billion in equipment-secured leases and loans and has continued to grow into one of the largest equipment financing companies in the country.

### THE PROBLEM

WCF is led by an experienced management team with, on average, 25 years of experience. Leveraging the team’s extensive knowledge, WCF enables customer success through creating financing solutions uniquely tailored to the customer’s specific business requirements, including capital equipment leases and loans, sale leasebacks, structured financing and loans, refinancings, and more.

To continue growing meaningfully in a highly competitive lending environment, WCF’s Executive Vice President & Chief Sales Officer, Thomas Forbes, and his team realized they needed to integrate pricing operations and leverage WCF’s organizational dataset within its Salesforce ecosystem to provide the quick, flexible, and profitable financing solutions that the market expects and to achieve the growth WCF desires.

CUSTOMER



PRODUCT



SuperTRUMP for Salesforce

INDUSTRY



Equipment leasing and finance

ORGANIZATION SIZE



Medium-sized



SuperTRUMP is the industry standard for lease and loan modeling and pricing. With SuperTRUMP available as a native Salesforce application, and our desire to have all components of our transactions integrated into Salesforce, the transition made perfect sense.”

Thomas Forbes  
Executive Vice President & Chief Sales Officer  
Wintrust Commercial Finance

## THE SOLUTION

After initially implementing Salesforce, WCF identified several inefficiencies that regularly burdened sales representatives, including spending too much time navigating between disconnected applications, laboriously tracking yield and margin, and not being able to provide on-demand metrics for compensation purposes. It became clear to the WCF team that these issues could be solved by centralizing pricing operations in Salesforce.

Since the entire WCF sales team was familiar and comfortable with SuperTRUMP Desktop, WCF did not evaluate any other pricing applications and decided to transition from SuperTRUMP Desktop to SuperTRUMP for Salesforce. “SuperTRUMP is the industry standard for lease and loan modeling and pricing,” said Thomas Forbes, Executive Vice President & Chief Sales Officer, Wintrust Commercial Finance. “With SuperTRUMP available as a native Salesforce application, and our desire to have all components of our transactions integrated into Salesforce, the transition made perfect sense.”

After a couple of training sessions, the WCF team was able to easily transition from SuperTRUMP Desktop to SuperTRUMP for Salesforce in only six months.

WCF found SuperTRUMP for Salesforce to be highly intuitive, with robust pricing functionality. The user-friendly interface and integrated access to the entire Salesforce dataset simplified pricing for the sales team and made it significantly easier and faster to create and process a new transaction for an existing customer. Another, and arguably more important, benefit arose – lease and loan originations increased because sales representatives spent more time calling customers and prospecting new customers and much less time navigating between disconnected software applications.

“The Ivory Consulting team did an excellent job adapting to our changing business requirements,” said Thomas Forbes, Executive Vice President & Chief Sales Officer, Wintrust Commercial Finance. “They are incredibly knowledgeable, very responsive, and we have a great deal of confidence in the information they impart and the support they provide.”

## PRODUCT OVERVIEW

### Integrate SuperTRUMP lease and loan modeling and pricing into Salesforce.

SuperTRUMP for Salesforce was created by integrating Ivory Consulting's flagship software application, SuperTRUMP, into Salesforce. The combined solution provides an easy and simple way to create a new quote by merging the modeling and pricing of complex equipment leases and loans from SuperTRUMP with customer and other relevant data stored in Salesforce – significantly increasing operational efficiency.

As business functions continue to move into the cloud, more and more lessors are choosing SuperTRUMP for Salesforce to provide integrated modeling and pricing of equipment leases and loans in their respective instances of Salesforce. Using SuperTRUMP for Salesforce enables lessors to increase employee efficiency by streamlining quoting and processing operations with instant access to customer data, transaction history, and reports in Salesforce. Furthermore, SuperTRUMP for Salesforce users can usually quote deals in less than a minute, especially quotes for existing customers where data in Salesforce can be instantly replicated. Users can also perform a broad spectrum of financial analyses and optimizations using data that is consistent across the organization because it is centralized in Salesforce.

Sales representatives and pricing managers use SuperTRUMP for Salesforce to:

- Price any type of transaction – from a term loan to TRAC leases, to highly structured tax leases
- Drive profitability by accurately calculating economic and accounting data – yields, rents, payments, taxes, and residuals
- Account for a full range of fees, subsidies, book and tax depreciation methods, FASB ASC 842 and FASB 13 rules, and IRS classification tests
- Measure profitability by defining business-specific yields such as ROE, ROA, IRR, MISF, and spread over indices

## UNIQUE BENEFITS

### INTEGRATED PRICING

Streamline the quote-to-fund process with instant access to opportunities, quotes, transactions, and customer history stored in Salesforce.

### INCREASED ORIGINATIONS

Enable sales representatives to spend more time calling customers and prospecting for new customers and less time navigating between disconnected software applications.

### IMPROVED DATA ANALYTICS

Leverage combined Salesforce and SuperTRUMP for Salesforce reporting capabilities to perform a broad spectrum of financial analysis and optimization with data that is consistent across all users.