

Spreadsheet use reduced by 75%



LIGHTHOUSE
FINANCIAL

“With the automated report that rSTAR built for us, we save one hour per day of time-consuming manual work. That’s a huge boost to our efficiency.”

— Jake Vance

Chief Technology Officer,
Lighthouse Financial

Technologies

- ✓ Salesforce CRM

Services

- ✓ Built custom email templates integrated with Salesforce Sales Cloud Quickstart
- ✓ rSTAR’s Salesforce managed services

Results

- ✓ Automation of critical customer email saved employees one hour of time per day
- ✓ Value worth of the time already saved comes to nearly \$20,000 and 400+ hours, continuing even today
- ✓ Implementation of enhancements of Salesforce app exchange apps
- ✓ Improved automation with the launch of Salesforce workflows
- ✓ Improved Salesforce usage

About the Client

Lighthouse Financial Corp. is a privately-owned commercial finance company specializing in providing asset-based loans secured by accounts receivable, inventories, and fixed assets to small and medium-sized businesses whose financial needs cannot be met by traditional bank loans. The North Carolina-based company began using Salesforce as its primary CRM system in 2022, and found they needed post-implementation assistance and special project support. rSTAR provided managed services for Lighthouse with an emphasis on Salesforce post-implementation support, troubleshooting, and enhancement requests.

Goals

- ✓ Reduce or eliminate spreadsheet use
- ✓ Automate common business processes through Salesforce
- ✓ Improve Salesforce workflows

Outcomes

- ✓ Spreadsheet use reduced by **75%**
- ✓ Salesforce automation saved each employee one hour of time per day by automating vital customer emails
- ✓ Workflows and transition to Salesforce made data easier to find, use, and reference



“rSTAR is very knowledgeable about Salesforce. They’re very easy to work with and they’re always available. They’ve got our backs.”

Jake Vance, Chief Technology Officer, Lighthouse Financial