

# Growth Story



## The Challenge

**Finding accurate direct dial phone numbers and new, targeted prospects**

Twelve percent of Northwestern Financial Advisors will not make it five years at the company. In the financial planning industry, the representative turn-over rate has always been a major issue. Without financial representatives being able to increase their pipeline and spend their time making direct dials vs. searching for phone numbers can lead to unnecessary frustrations that can result in lowered production, high career risk, and staff time spent inefficiently.

That's when Nick Shultz, Field Director in the Woburn, MA office, decided to take a proactive approach and see how ZoomInfo could help him and his staff out.

"ZoomInfo is 100% amazing. It is a huge time saver and has way more useful info than LinkedIn. It comes in handy most for the larger companies. But even for smaller ones, it will narrow your search down too," explained Ben Milillo, Associate Financial Representative.



Since partnering with ZoomInfo, Northwestern Mutual's financial advisors have increased their pipeline and productivity by allowing reps to spend more time on the phone

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## The Customer

Northwestern Mutual provides access to products and services of a world-class company, including investment, estate analysis, retirement solutions, education funding, employee benefits and insurance. The company has been in business for 158 years and started as a life insurance company. Northwestern Mutual has become the premier insurance and investment company in the U.S.

**Industry:** Financial Planning

## The Solution

### **The company's financial advisors used ZoomInfo's database to fuel their pipelines and increase productivity**

As a financial advisor, the call and feeder lists need constant revamping to stay up to date with the most accurate and direct profile and contact information. Manually searching on Google and LinkedIn was not effective, efficient, or accurate enough as standalone approaches. ZoomInfo allowed Shultz and his team to find direct dial phone numbers and create feeder lists for prospects outside of LinkedIn.

## The Results

### **Access to ZoomInfo's direct dial phone numbers and email addresses helped save time and drive success**

ZoomInfo's contact data provided Northwestern Mutual with accurate direct dial phone numbers and email addresses, empowering Shultz to make supplemental feeder lists which helped him build his pipeline, drive success, and save his team time, frustration, and money better spent elsewhere.

Over time, the Northwestern Mutual Group in the Woburn office was able to review the savings of time breakdown. They calculated that there was at least a 75% time savings, and therefore, money savings for the team.

"Time is money, whether it's my time or my staff's time. The time savings equates to money savings which multiplies exponentially over a short duration," stated Shultz. "I am able to book more people quickly and easily. From there, I get introduced to even more leads that I have no problem or issues reaching with ZoomInfo."

With ZoomInfo, financial advisors can now utilize a simple and easy solution that with drive success and satisfaction. They now have the ability to be proactive in their outreach and also generate prospects when the pipeline gets low.



**Using ZoomInfo has allowed my team and me to increase our pipelines and spend more time on the phone as opposed to researching contact information manually."**

**Nick Shultz**

Field Director at Northwestern Mutual.