RocketReach

How Identifee Saves Clients Dozens of Hours a Month with RocketReach's API

CHALLENGE:

The traditional prospecting process faced by Identifee's clients involved several time-consuming processes, including logging into separate systems to manually pull prospecting lists and then entering the customer data into their CRM. This process not only consumed a significant amount of time but also led to potential errors and inaccuracies in client profiles.

OVERVIEW:

Identifee, a specialized engagement platform, makes it simple for banks and credit unions to better identify, engage, and educate their customers. They faced the challenges of the traditional prospecting process, which was very time consuming and involved several labor-intensive steps. Explore how Identifee was able to streamline the processes with RocketReach's API integration.

"When evaluating data partners, we chose RocketReach because of its exceptional data quality. The partnership with RocketReach has revolutionized our workflow. We have automated and streamlined the prospecting process, allowing us to pull beyond basic contact and company details, such as technographics. Previously, this process took customers hours and hours to complete and now it just takes minutes."

- Kevin Miyamoto
Chief Operating Officer, Identifee

identifee

SOLUTION:

With their deep understanding of the workflows for regional banks and credit unions, Identifee has created an engagement platform specialized for the financial services industry. By partnering with RocketReach and embedding RocketReach's extensive and powerful database via our email finder API, Identifee has significantly shortened the process and time to impact.

The once labor-intensive prospecting process has been automated and condensed from hours and hours of effort to just a few clicks per sales representative per month. Instead of manually pulling and entering data, users only need to type in an initial contact search, click import, and then all company records get automatically applied to the right company profile.

On top of that, with the integration into RocketReach's accurate and comprehensive database, Identifee clients were able to identify suitable leads, evaluate various companies, and understand their technology landscape right in one platform.

Overall, the integration with RocketReach saved Identifee clients over 95% in prospecting time per rep.

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