A Financial Services Firm Cut Email Bounce Rates by 72% with 360 VTM

Industry
Financial Services

Company Size
Not Disclosed

Region
United States

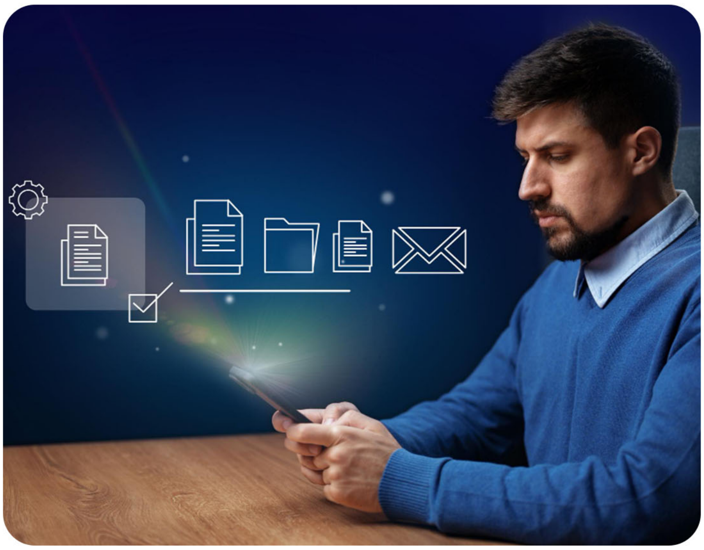
Featured Solution
360 VTM (Verify the Email) for Salesforce

The Customer

The customer is a U.S.-based financial services firm offering lending, wealth management, insurance, and advisory services to individual and institutional clients. The firm relies on Salesforce to manage client onboarding, relationship management, compliance communications, and ongoing account servicing. With thousands of new records entering Salesforce every month through web forms, advisor referrals, and partner channels, maintaining financial services data accuracy had become increasingly difficult.

Problem Statement

The firm needed a reliable financial services email verification process to ensure client email addresses were accurate before they entered Salesforce and downstream communication workflows. Invalid, mistyped, and risky email addresses were making their way into the CRM, resulting in high email bounce rates, reduced sender reputation, unnecessary operational effort, and growing concerns around CRM data quality and the reliability of customer records used for client communications and compliance processes.



The Challenge

Reduce a consistently high email bounce rate that was impacting campaign performance and sender reputation.

Prevent invalid, disposable, role-based, and high-risk email addresses from entering Salesforce during lead capture, client onboarding, and advisor data entry.

Clean thousands of existing Contact and Lead records without disrupting business operations.

Reduce the manual effort spent identifying, correcting, and maintaining client email records before campaigns and account communications.

Improve confidence in compliant customer data used for regulatory notices, account statements, service updates, and marketing outreach.

The Solution

- Enabled real-time email verification across Web-to-Lead forms, manual record creation, and advisor onboarding workflows, preventing invalid email addresses from being saved in Salesforce.
- Performed a bulk email verification of the existing Lead and Contact database to identify invalid, inactive, disposable, catch-all, and risky email addresses.
- Configured Salesforce Flow automation to trigger scheduled re-verification, ensuring contact records remained accurate as customer information changed over time.
- Used verification status fields to automatically route invalid or risky records to operations teams for review before marketing campaigns and customer communications.
- Delivered complete visibility into email health through native Salesforce reports and dashboards, allowing marketing and compliance teams to monitor CRM data quality proactively.

The Outcome

By implementing 360 VTM, the financial services firm shifted from reactive data cleansing to proactive data validation. Every new client record was verified before entering Salesforce, while legacy data was systematically cleansed through bulk verification and ongoing automated re-validation. The result was a significantly healthier CRM, improved campaign performance, stronger financial services data accuracy, and a repeatable process to reduce bounce rate and support regulatory expectations.

The Impact

74%
reduction in email bounce rates within 90 days

33%
improvement in email deliverability across client communications

18
hours saved every week on manual CRM data cleansing

96%
of legacy Contact and Lead records verified during the initial bulk validation

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360 Verify The Phone & Email