



Nextiva Customer Success Story



CLIENT: Goldberg HedgeFunds
EMPLOYEES: 10+
LOCATION: Heath, TX
SOLUTION: Business Communications Suite

“ Our whole business and client retention is centered around Nextiva CRM. ”

– Andrew Goldberg, President, Goldberg HedgeFunds

Customer Overview

Goldberg HedgeFunds is a financial services business based in Heath, TX that provides short-term small business loans. A longtime Vonage and Zoho user, Goldberg switched to Nextiva Business Communication Suite for its business phone service and CRM needs, resulting in a 227% increase in monthly loans originated over the first 6 months using the platform.

Dilemma

Before implementing Nextiva, Goldberg HedgeFunds used a combination of Zoho and Vonage. They were frustrated with the quality of their phone service, the lack of customer data visibility across systems, and the overall usability of their CRM.

“My team found Zoho confusing. We would see a lot of irrelevant information on customers and current opportunities, get confused, and end up wasting time,” GHF President Andrew Goldberg says. “Every time we wanted to give a new loan to an existing customer, we had to create a duplicate account. This made it extremely difficult to track full account history in one view and understand how to best serve our customers.”

Inefficient processes were impacting Goldberg’s business. “Speed is incredibly important in our business. There are small business owners literally relying on our funding who need it in a very short time frame. We needed a CRM that would help us deliver it to them.”

Resolution

Goldberg switched his business to Nextiva Voice, first, and was pleased with the superior business phone service Nextiva provided compared to Vonage. It wasn’t long before he set his sights on the problems with their CRM.

“I was blown away by what Nextiva offered compared to other companies,” Goldberg says. “I love the ability to see who I’m talking to and manipulate the call within the CRM in one click.”

Goldberg also strongly prefers Nextiva’s account interface. “With Nextiva, I can set up multiple files with one client. All the information is clustered clearly. It doesn’t tell you anything you don’t need to know.”

Per Goldberg, Nextiva has enabled his team to move at the speed of its customers. “With a couple of clicks, we can patch the right people from our team into the conversation, then get all the notes and history so we can fund deals immediately.”

One of Goldberg’s favorite features is the ability to initiate calls and send emails from within the CRM. “We automate all our customer communication with emails to manage our book of clients. These features help us follow up with leads, refinance customer loans, and secure new business.”

Per Goldberg, one of the most significant benefits of Nextiva is its usability. “The ease-of-use is extreme; it only took a five-minute class and my employees were ready to start closing deals with Nextiva.”

Business Results

Tripled monthly revenue

growing by +227% in the first six months after implementing Nextiva.

Achieved greater efficiency

by eliminating confusion and saving lost opportunities with a single, integrated customer management and communications platform.

Reduced operating costs

by consolidating CRM and phone service solutions.