



How Ascensus strengthens marketing-to-sales handoff with actionable buyer intent signals.

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Case Study | Financial Services



[Ascensus](#) is a U.S.-based financial services leader helping millions of people save for retirement, education, and disability-related expenses.

Ascensus has \$1.3T in assets under administration and is headquartered in Dresher, Pennsylvania (USA), supported by 5,000+ associates.



[SalesWings](#) helps revenue operations teams in financial services engage their customers in a timely, relevant and effective manner to achieve their ambitious goals.

By providing marketing, sales and agents with a user-friendly way to understand their buyer's intent, SalesWings customers grow conversion rates at every step of the funnel.



Executive Summary



Our entire Sales team now has consistent, easy access to digital engagement signals directly within their day-to-day sales workflows. This allows our Sales team to make informed decisions based on real data for their outreach.

Amanda Germann
Marketing & Sales Platform Owner



Business Objective

Supporting multiple sales teams and lines of business, the Ascensus Sales team needed a practical way to leverage first-party digital engagement to facilitate more effective sales actions inside the CRM.

The Power of Behavioral Intelligence

With two thirds of the buyer journey now being digital, a clear understanding of buyer intent was key. Thanks to SalesWings' user-friendly solution, Ascensus started unifying engagement signals across marketing and sales touchpoints to achieve precisely that.

Lasting Impact

By embedding SalesWings insights quickly into CRM workflows, Ascensus strengthened the connection between marketing engagement and sales actions. Teams can now clearly understand what prospects are researching, prioritize outreach and engage buyers in more impactful sales conversations.



Business Objective



As we scaled our go-to-market efforts, we identified an opportunity to enhance how high-quality leads are surfaced—helping our sales teams engage faster and more effectively.

Amanda Germann
Marketing & Sales Platform Owner



Poor visibility into buyer intent

Ascensus needed to modernize their go-to-market approach and become a more data-driven sales and marketing organization.

Leadership identified that it was key to make digital engagement usable for revenue teams, not just visible in marketing analytics. Their buyers would perform lengthy research prior to reaching out to Ascensus, giving the sales team little control over the buyer cycle.

The goal was to give sellers more knowledge about prospect interest before outreach, especially when a prospect is actively engaging with specific offerings.

Fragmented tech and data silos

Ascensus operates multiple lines of business with separate sales teams. While their marketing automation system of reference is Salesforce Marketing Cloud for both teams, one Sales team uses Salesforce CRM and the other relies on Microsoft Dynamics.

This made it difficult to standardize how intent signals get interpreted, prioritized, and routed. Keeping teams working in their systems of record, while improving lead prioritization and tightening sales and marketing alignment without creating extra administrative load was therefore a key requirement.



Solution Overview



SalesWings' approach, where it acts as an integrated analytics engine rather than an additional tool our teams need to adopt, is a huge plus.

Amanda Germann
Marketing & Sales Platform Owner



Why SalesWings

SalesWings provided an ideal way to capture intent signals and translate them into insights that can be shared across teams. Its flexibility allows Ascensus to apply scoring across multiple divisions. Purpose-built integrations with Salesforce Marketing Cloud and Sales Cloud, combined with robust APIs to bring the data into Microsoft Dynamics, made the solution fit right into the stack.

Implementation

Ascensus operationalized SalesWings in a CRM-first way:

- **Opportunity modeling with behavioral signals:** SalesWings engagement data is incorporated into Ascensus' opportunity analysis and reporting, alongside sales activities and firmographic data, helping teams understand which combinations of signals correlate with pipeline creation and conversion.
- **Actionable insights:** Behavioral scoring and intent insights are used to measure engagement across sites and forms, then fed into CRM to evaluate whether the engagement is progressing toward opportunity creation and positive sales outcomes.
- **MQL workflow automation:** The CRM generates a task for the internal sales team to [call while the prospect is warm](#).
- **Sales adoption in native systems:** Sales teams primarily consume SalesWings insights from within the CRM, using those signals to prioritize focus contacts and access detailed activity history.



Solution Overview



We started pulling SalesWings data into Power BI and successfully identified combinations of sales and marketing actions which correlated with opportunities. It's a big win for us.

Amanda Germann
Marketing & Sales Platform Owner



Positive Outcomes

With SalesWings insights flowing into CRM workflows, Ascensus [strengthened the connection between marketing engagement and sales actions.](#)

Ascensus began pulling SalesWings data into Power BI alongside other systems to “slice and dice” engagement patterns. That includes analyzing activity over an 18-month window, [mapping sales and marketing touchpoints](#), and identifying combinations of actions that correlate with opportunities and sales.

Teams can better understand what prospects are researching (and where), prioritize outreach based on behavioral activity, and support more personalized sales conversations aligned to Ascensus’ client-centric approach.

The Results

- More accurate and intentional lead qualification
- Stronger sales and marketing alignment through shared data models
- Deeper visibility into prospect behavior and buying signals

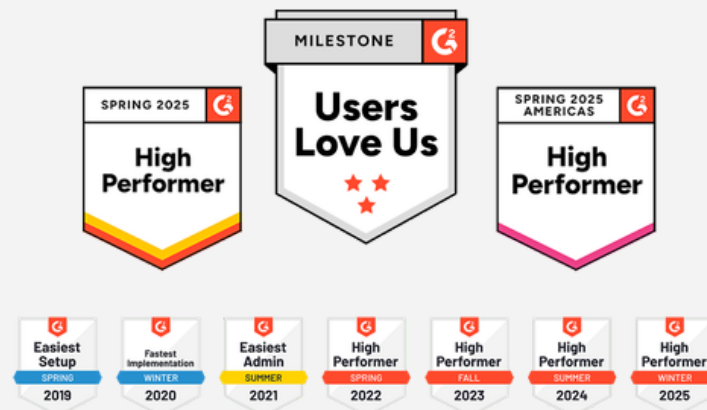
The SalesWings logo, featuring a stylized blue icon of a person with wings, followed by the word "SALESWINGS" in a blue, sans-serif font.

SalesWings for Financial Services

SalesWings helps revenue operations teams in [financial services](#) engage their customers in a timely, relevant and effective manner to achieve their ambitious goals.

Learn more about our solutions:

- Behavioral [data](#) collection
- Behavioral [intelligence](#)
- Website [lead generation](#)
- Sales [efficiency](#)
- Reporting & [analytics](#)
- [Salesforce](#) integration



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