

CASE STUDY:

Anduin: Savings Hours Every Day With Affinity

ABOUT ANDUIN

Anduin Transactions is a San Francisco-based financial technology company focused on helping investors, lawyers, and executives close deals with accuracy, transparency, and speed.

THE CHALLENGE

After devoting months to building its product, Anduin was ready for a full-fledged launch. The team, which includes 30 international team members, needed to establish a process for managing relationships with customers. Up to that point, it had relied on a mix of shared doc, Confluence pages, and Excel spreadsheets.

ENTER AFFINITY

For Anduin, Affinity's comparative advantage boiled down to its time saving capabilities. The implications have been far-reaching:

1. Getting the initial meeting

Affinity has empowered Anduin to supercharge its lead generation process. Using Affinity, the team can see who can make referrals and warm introductions to leads. The team saves ~75% of the time it previously spent to secure an initial meeting with a lead. And because leads have been introduced via a personal connection, they have an added incentive to provide product feedback. For Anduin, this feedback can be more valuable than any deals signed.

2. Seamless Follow Up

Anduin leverages Affinity on a daily basis for contact management. With automatic email capture, Anduin is able to quickly understand the full context behind all relationships without needing to painstakingly search through email threads.

3. Rapid Report Generation

Instead of searching through different spreadsheets and documents, the Anduin team uses Affinity's dashboards to quickly assess where specific leads are in the funnel. Rather than manually creating reports, the team takes snapshots of dashboards to include in updates to board members, investors, and others.

THE FUTURE

With it's eye on growth, Anduin is especially excited about Affinity's Alliances feature. By allying with their investor, Anduin was able to expand its network by 408 new contacts and 111 new organizations in seconds. In turn this allowed them to gain critical introductions to new potential customers who are members of 8VC's lucrative network.

**"I'll check my Alliances weekly to see which new ones I can form.
As we scale, Affinity's Alliance will be instrumental to our growth."**

-Simon Holstein, Product Specialist

In much the same way that Anduin saves its customers time in streamlining the financial transaction workflow, Affinity empowers Anduin to gain back previously lost hours each day by streamlining relationship management.



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Affinity is a relationship intelligence platform built to expand and evolve the traditional CRM. Affinity instantly surfaces all of your team's data to show you who is best suited to make the crucial introductions you need to close your next big deal.