



## How Salesforce helped Power an Australian financial firm?

### Challenge

- Company had Salesforce, but it wasn't being used effectively. Need for a cohesive system.
- Lack of provision to view or reallocate booked appointments.
- System did not allow client tracking for multiple services or duplicate clients.
- Lack of property tracking system - stock list, availability, construction progress.
- Lack of lead management system.
- No reporting system in place.
- Problem Areas: Data accuracy. Clients' satisfaction. Advisors' performance.

### Our Solution

- Implemented an end-to-end sales process
  - Created work flow rule for appointment reallocation, to update lead wnership and to trigger multiple automated actions.
  - Used web-to-lead forms to capture leads
  - Setup duplicate client management for lead and client records.
  - Setup custom fields and created custom reports and dashboards
    - Forappointments grouped by status and time.
    - To display status and progress of clients.
    - To track properties and their construction status.
    - Enabled lead source tracking and created a report to track it.
    - To track event and seminar costs.
- System built for Lightning Experience for easy visual navigation and to support customer-centric selling.
- Enabled tracking of current and historical properties

### Client Description

- An Australian firm in the business of providing personal wealth management, property investment services and home loan assistance.
- Client notes taken by the sales team logged in manually by system admin. No data access to sales team.
- Use Salesforce, but not effectively. Need for a cohesive system.

- Created Conga Composer solutions to manage reports and documents, and automate the reporting process.
- Implemented Salesforce for Outlook (SFO) to sync leads, contacts, tasks and events between Salesforce and Microsoft Outlook for each user.
- Set up approval process for management / sales team.

## Business Benefits

- Implemented a tailored Salesforce CRM solution that made tracking and analyzing the sales process easy and efficient.
- Using Salesforce's workflow capabilities enabled IT to accelerate delivery of new applications.
- Improved quality of data manifolds.
- Greatly increased productivity of sales staff.
- Better clients' experience and greater satisfaction.

### About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. We have years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Lightning platform development.

We assess your needs to provide maximum value through IT to increase your impact and achieve your mission.



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