



## Fortius Improves its business practices with Salesforce

### Challenge

- Inefficiencies of scattered data becoming too costly an operational burden.
- Use of multiple software along with Salesforce Org not doing justice to the Salesforce platform.
- Need for using Salesforce for easy management of various Fund offerings for collaboration, as a process automation platform and to make investment data available from a single dashboard.
- Exploring ways to make existing marketing tool to work with the new system, to avoid the learning curve.

### Idea

- Perform a health check on existing Salesforce Org and remodel it to reflect the exact business use cases

### Our Solution

- Customized Salesforce Org to create different investment vehicles such as Wholesale, Separate Accounts, JV Business, Syndication, Global Property Securities, & Debt Business and enabled tracking of investments for each of them
- Facilitated tracking of both committed and proposed investments through various stages of sales path.
- Different Investors (such as HNW (High Net Worth) Individuals, SMSF (Self-Managed Superannuation Fund), Discretionary Trust, Groups Investors, Institutional Investors) were modeled in Salesforce with appropriate record types controlling the actual flow for the various demography of users.

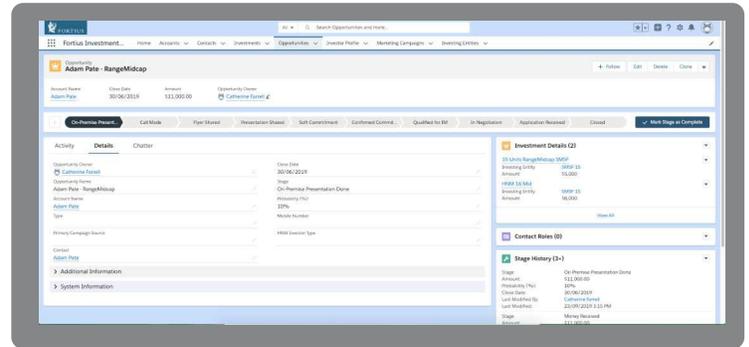
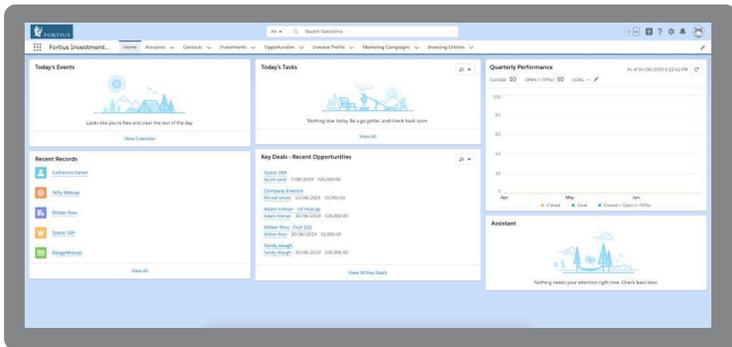
### Client Description

Privately-owned Australian investment management group specializing in the management of real estate assets and portfolios for superannuation funds, offshore and onshore institutions and high net worth individuals.

- Implemented integration hook of Salesforce with Fortius' marketing tool, MailChimp, and enabled management of marketing campaigns.
- Created hierarchy of campaigns so that they can create a related campaign in a hierarchy and have a better insight into campaign effectiveness.
- Created dashboards to provide granular control of data access.

## Business Benefits

- Streamlined utilization of Salesforce across organization and brought back to life 6+ years old Org that was out of sync with current business practices.
- Improved client outreach by the Sales team, with real time status updates of investment vehicles.
- Synced Salesforce with cost-effective Mailchimp, while enabling actionable journey of lead/ contact using Salesforce.
- Singular effort for tracking marketing campaigns for marketing team due to Mailchimp & Salesforce integration.
- Cross selling different investments made easier.
- Fund managers to have seamless fingertip access to all the relevant information with Dashboards.



## 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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