

Optimising Customer Information Management FOR THE FINANCIAL SERVICES INDUSTRY



Let's build something better









Artisan Consulting has worked with the following Financial Services Organisations to improve how they manage customer relationships using Salesforce® products.






Representative Case Studies where Artisan has helped organisations in the Financial Services Industry include:



Salesforce Services

Program and Project Delivery
Sales – Service – Marketing
Digital Experience & Portals
Support and Enhancements
Architecture and Design
Resource Augmentation
Technical Audits

 <p>https://www.oliverhume.com.au/</p> <p>Sales Cloud, Experience Cloud</p> <p>Oliver Hume is a property developer and fund manager who uses Salesforce to manage property developments.</p> <p>Artisan provided Salesforce Architecture, Program Governance and Development Services during the period 2015-2018 including work on Commission Management and Trust Accounting.</p>	 <p>https://www.lendi.com.au/</p> <p>Sales Cloud, Service Cloud, Experience Cloud</p> <p>Lendi operates an Online Home Loan Platform and uses Salesforce to manage broker relationships and loan applications.</p> <p>Artisan performed a Technical Audit followed by work to enhance how customer data was managed.</p>	 <p>https://www.racv.com.au/</p> <p>Sales Cloud, Service Cloud, Experience Cloud, Integration and Marketing Clouds</p> <p>RACV provides a wide range of services for members include home and motor insurance policies through a JV with IAG.</p> <p>Artisan provided Architecture, Development, Consulting and DevOps resources during the period 2017-2020.</p>	 <p>https://australia.bmsgroup.com/</p> <p>Sales Cloud, Service Cloud, Marketing Cloud (Pardot)</p> <p>BMS Australia is a specialist insurance broker providing policies to allied health professionals in Australia and NZ.</p> <p>Artisan delivered the first greenfield implementation which went live in 2020 which included integration to UCP.</p>
 <p>(no longer operating)</p> <p>Sales Cloud, Experience Cloud, Financial Services Cloud</p> <p>Provided financial planning to more than 1,000 doctors, dentists and other medical professionals.</p> <p>Artisan delivered the first greenfield implementation using a Community to provide an online fact finder with integration to Xero Practice Manager.</p>	 <p>https://www.eway.com.au/</p> <p>Sales Cloud, Service Cloud, Experience Cloud, Shield</p> <p>eWay has a range of shopping cart and software integrations for eCommerce sites handling credit card payments.</p> <p>Artisan performed a series of Technical Audits and provided Salesforce Architecture services to establish a program roadmap.</p>	 <p>https://www.ezidebit.com/</p> <p>Sales Cloud, Service Cloud, Experience Cloud. Shield</p> <p>Ezidebit supports eCommerce sites handling payments by Direct Debit, EFTPOS, BPAY and Real Time methods.</p> <p>Artisan performed a Technical Audit and provided Salesforce Architecture services to establish a program roadmap.</p>	 <p>https://www.mebank.com.au/</p> <p>Sales Cloud, Service Cloud</p> <p>Members Equity Bank provides branchless banking services across Australia.</p> <p>Artisan provided a range of services supporting ME Bank's Salesforce implementation including data migration and a conversion to Lightning Experience</p>

				
NAVIGATOR SPECIALIST II	NAVIGATOR SPECIALIST II	NAVIGATOR SPECIALIST I	NAVIGATOR SPECIALIST I	NAVIGATOR SPECIALIST I
Platform	Sales Cloud	Service Cloud	Customer Portal Including Self Service	Digital Engagement

WE'VE ASSISTED DIVERSE CUSTOMERS ACROSS AUSTRALIA.
HOW CAN WE HELP YOU?

Contact us today if you need assistance to implement, operate or optimise Salesforce

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