



FIND YOUR GROWTH PARTNER

# Case Study

ENHANCING BUSINESS EFFICIENCY AND GROWTH  
WITH SALESFORCE INTEGRATION



OITC: CASE STUDY

# Overview

One of Australia's leading business and franchise brokers marketplace partnered with OITC to help improve their facilitation of connecting business owners looking to sell their businesses and prospective buyers seeking investment opportunities. Before the integration of Salesforce, the company faced significant challenges in processes that interfered with growth and productivity.

## Challenges

Before adopting Salesforce, the team encountered inefficiencies from using another CRM system. The main issue was the manual and repetitive nature of the steps required to list new businesses for sale on their website. This operational bottleneck resulted in significant time and resource wastage for the team.

## The Objective

Our main objective was to completely transform their business processes by implementing Salesforce. Our immediate purpose was to establish a largely automated system that could streamline the listing and selling of businesses. Additionally, our customers wanted to improve communication efficiency, making client interactions more enjoyable and productive.

## Products & Solutions

- Leveraged Sales Cloud and Account Engagement for operational transformation within the business.
- We integrated third-party applications into existing products to construct an automated framework.
- The primary goal was to automate the delivery of vital communications: contracts, opt-in emails, offer notifications, and broader marketing messages to relevant stakeholders.



## Results!

Integrating Salesforce has brought significant benefits, with increased efficiency and automation. The shift from manual, time-consuming processes to a largely automated system streamlined operations and empowered the team to redirect their efforts towards fostering business growth. These saved hours have been reallocated to activities to drive business growth. The newfound efficiency empowered the team to focus on strategic initiatives, fostering a more competitive edge in the marketplace.

## Why Salesforce?

Firstly, other options / competitive platforms failed to demonstrate how technology could effectively resolve their particular issues.

Secondly, Salesforce stood out due to its strength, flexibility, and ability to tackle the company's unique issues. Its seamless integration with third-party apps and wide-ranging solutions for sales and account management set it apart from competitors.

Finally, Salesforce's versatility and efficiency played a pivotal role in reshaping its approach to business, positioning it as a more competitive player in the market while ensuring a more satisfying customer experience.

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CONTACT US WITH ANY AND ALL QUESTIONS, QUERIES  
OR DREAMS YOU MIGHT HAVE.



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