



FIND YOUR GROWTH PARTNER

Case Study

TRANSFORMING FINANCE:
HOW SALESFORCE IGNITED EFFICIENCY AND GROWTH



OITC: CASE STUDY

Overview

Partnering with OITC, an established Australian financial services provider with around 100 business finance professionals servicing various industries nationwide, implemented Salesforce Experience Cloud. The goal was to improve processes, facilitate business growth, and increase employee productivity.

Challenges

Before teaming up with OITC, the company dealt with considerable operational challenges. Relying on manual application processing consumed excessive time and resources, negatively impacting customer experiences—the lack of speed and efficiency due to manual processes created friction in the company's workflow.

The **Objective**

The primary objectives were to digitise and streamline manual product application, assessment, approval, and settlement processes. OITC's objective was to improve efficiency and enhance user experiences through automation with Salesforce.

Products & **Solutions**

Already using Salesforce as its primary business platform, Experience Cloud was a natural choice for its portal. Their decision was driven by the desire to consolidate important data directly on the Salesforce platform, helping to simplify the entire application process.

The implemented solution included a custom-designed Experience Cloud portal and integrations with Illion, Bankstatements, and Equifax. Additionally, numerous automated flows were incorporated to enhance overall efficiency.

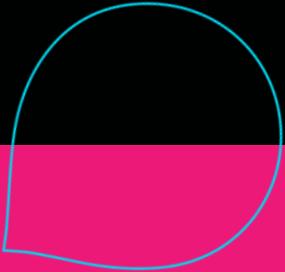


Results!

- The outcome of the Salesforce implementation led to tangible improvements, including improved processes and better customer experiences.
- Adopting the Salesforce platform has helped the company compete more effectively, fostering business growth.

Collaborating with OITC

The implementation took several months and was divided into multiple phases for better management. Feedback rounds were held to improve the design, and changes in functionality were accommodated. The collaborative efforts resulted in a successful deployment.



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



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