



FIND YOUR GROWTH PARTNER

BalanZ

Customer Success Story

**Expertise in Financial Cloud Services:
A Decisive Factor in Choosing Out In The Clouds**

CREST

CONSULTING PARTNER

BY OUT IN THE CLOUDS

APAC Partner
of the Year
Awards 2021

salesforce





BALANZ



BALANZ



OVERVIEW:

With 20 staff across three locations, Balanz is a leading finance business in Australia catering to a diverse clientele, ranging from PAYG staff to large, complex companies.

PRODUCT:

Financial Services Cloud

INDUSTRY:

Financial Service

Objective

In the competitive world of finance, maintaining strong client relationships is paramount for success. Balanz recognised the need for a solid CRM system to help improve client interactions, business efficiency and prepare them for future customer expectations.



Challenges

Before working with Out In The Clouds, Balanz faced challenges due to the lack of a unified CRM system. With scattered vital client data across various sources, managing information for nearly 500 clients was challenging and time-consuming.

The Balanz team needed a solution to streamline their business processes to help provide consistent client relationship management.



Solutions

To address their challenges and improve client interactions, business efficiency, and future customer expectations, Out In The Clouds provided Balanz with a comprehensive CRM solution that has allowed for full visibility of clients across Security Holdings, Financial Accounts and Covenants, along with any additional individuals and entities related to those clients.



Results

Streamlined Data

Balanx wanted to improve their client interactions and business efficiency with a CRM system; however, they quickly realised that a successful implementation depended on finding a partner who knew the financial industry well. Since the financial sector has its own rules and terms, it needed customised solutions.

Out In The Clouds was the perfect choice, with in-depth knowledge of the financial industry. OITC's team skillfully adapted Balanz's Salesforce integration to suit their specific needs, giving them an edge over the competition and helping them grow.



Results

Client Success

As a business, their ethos is to focus on client engagement and success first. The team believes that by improving client interactions, rewards and positive financial outcomes naturally follow.

Thanks to their partnership with OITC, they are already seeing improvements, such as clients feeling more at ease during renewals and staff can easily add personalised touches, like receiving accurate birthday greetings.



Insight From Balanz

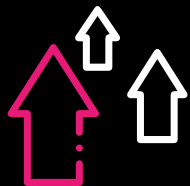
Unparalleled Understanding of the Financial Services Industry

“We found Out In The Clouds to be excellent. During the CRM provider selection process, we considered multiple options. When we were talking with Arnold and the OITC team, it became clear that they understood the financial services industry and were well-versed in the various terms and lingo used. Unlike other CRM providers, they really grasped what we were trying to achieve. I believe OITC is a major reason why we chose to engage with Salesforce instead of another CRM provider.”

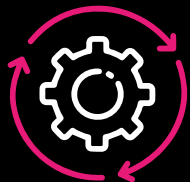
- Stephen Corbett
Director Balanz.



Key Results



The partnership helped Balanz streamline data, giving them real-time access to important information.



Increased client engagement, resulting in happier clients and improved renewals.



The team's response to the new system has been overwhelmingly positive, with everyone embracing its capabilities.



FIND YOUR **GROWTH** PARTNER

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



CONSULTING
PARTNER

MM+ Implementation Partner
of the Year ANZ



APAC Partner
of the year
Awards 2021

in outintheclouds/

@outintheclouds

f outintheclouds/

outintheclouds

THANK YOU



FIND YOUR GROWTH PARTNER

OUTINTHECLOUDS.COM