



FIND YOUR GROWTH PARTNER

IAM

2022

**MM+ Implementation Partner  
of the Year ANZ**



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Awards 2021**

salesforce



IAM

INCOME ASSET  
MANAGEMENT



# Company Overview

Income Asset Management Group Limited (IAM) delivers diverse solutions for fixed income investors across Treasury Management, Cash, Bonds, Debt Capital Markets, and Asset Management. Providing investors and portfolio managers with the most trustworthy and capable platform to research, execute and manage their income investments.

Leveraging the latest technology, IAM offers an innovative and streamlined approach to investing for wholesale investors, financial advisers and their clients, Government organisations, NFPs and community organisations, and custodians to manage their income assets.

## **LOCATION:**

Melbourne, Victoria

## **PRODUCTS:**

Pardot

Financial Services Cloud

## **INDUSTRY:**

Financial Services

**IAM** INCOME ASSET  
MANAGEMENT

## The Objective

Add fields and automation allowing the IAM Group to understand their buyer's behaviours, identify optimisation areas, and expand the business efficiently to meet industry and client expectations.

## The Challenges

- To improve Pardot for better insight and data on existing clients and new leads.
- They did not have a central CRM system capturing leads from their website and marketing campaigns.





# The Solution

- To match IAM Group's unique requirements - with all related automation built in line with their existing processes.
- With the OITC retainer service, IAM can enhance and make changes to their Salesforce Instance at any time.

# Specific Results

- IAM Group can now provide all leads with an exceptional and tailored customer experience thanks to accurate data captured.
- Boosted user adoption across the IAM Group
- Expanded reporting functionality on all levels.
- All employees can maximise their use, thanks to in-depth Salesforce user training.
- The sales team can quickly identify areas for optimisation.
- Now have a 360 view of a lead and customers' activity history.



PROJECT SECTION: **PARDOT IMPLEMENTATION**

## The Objective

To execute Pardot as their singular marketing tool to readily monitor client engagement with tracked assets and provide the leadership team with quality reporting.

## The Challenges

IAM Group could not easily communicate with customers and prospects based on where they are on their journey or what investments they have in their portfolio.



# The Solution

TO MEET THE OBJECTIVES OF THE IAM GROUP PROJECT SCOPE, OITC;

- Built **dynamic lists** to segment the database automatically based on their portfolio.
- Created an **engagement program** to manage event-related communications.
- Built out a **unique form** for their enquiry form to feed into Pardot
- Implemented Salesforce Engage, allowing the sales team to now send and **track emails created by marketing**.
- **Configured CRM automation** to allow relevant information in an individual's portfolio is rolled up to their account record.



# Specific Results

- 500 to 600% increase in organic lead generation from all channels
- IAM can now efficiently generate leads from their website.
- Create meaningful campaigns in correlation to user data captured via Pardot
- Streamlined processes by only using Pardot to send ALL marketing communications.
- Decrease in opt-outs from subscriptions.
- Pardot provides the Leadership team with clear campaign scores and results.







*“Working with OITC has been excellent! The entire end-to-end process was professional, and any questions, whether big or small, we’re never a hassle. We truly felt that the OITC project team that helped us with our Pardot implementation was an extended team to our own.”*

*- Eugene Mok - Product Manager, IAM Group*

# FIND YOUR **GROWTH** PARTNER

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



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**THANK YOU**



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