



FIND YOUR GROWTH PARTNER

KeyInvest

Customer Success Story

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

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salesforce



Key Invest



Key Invest



OVERVIEW:

Transforming Financial Services with Salesforce Implementation

KeyInvest, established in 1878, is a financial services company supporting the unique financial needs of its 50,000 members. Specialising in tax-effective wealth management solutions, KeyInvest partners with financial advisors and funeral directors to help members grow and manage their wealth through all stages of life.

SALESFORCE PRODUCTS / OITC SERVICES

- Sales Cloud
- Account Engagement
- Salesforce Knowledge
- Ads Studio
- Implementation
- Ongoing Support and Training with OITC

The Objective

Looking to streamline operations, improve communication with members and partners, and optimise resource allocation, KeyInvest needed to transform its operations by implementing a centralised CRM system. They also needed to measure and attribute activities to specific outcomes. To achieve these goals, KeyInvest required a partner with in-depth industry knowledge.



The Challenges

Before partnering with OITC to implement Salesforce, KeyInvest struggled with the absence of a CRM system. This lack of a centralised system led to:

- Manual and uncoordinated activities.
- Inefficient communication with both members and partners.
- Difficulty in tracking and attributing activities to outcomes.

These issues hindered KeyInvest's ability to optimise their resources and streamline their operations.



The Solution

Implementing Salesforce, with OITC as their partner, has revolutionised KeyInvest's business operations. The introduction of this robust CRM system opened up a world of possibilities:

- **Enhanced Communication:** Salesforce enabled KeyInvest to tailor their communication strategies to different audiences, from members with unique financial needs to partners like financial advisors and funeral directors, who have varying levels of understanding in financial services.
- **Customisation:** The CRM was customised to meet KeyInvest's bespoke needs, ensuring that every aspect of their operations was aligned with their unique business model and goals.



The Results

The implementation of Salesforce brought several tangible improvements:

- **Attribution and Measurement:** KeyInvest can now attribute activities and resources to specific outcomes, allowing for a more effective allocation of time and resources. This capability was previously unattainable.
- **Optimisation:** The ability to measure activities has led to the optimisation of processes, enhancing overall efficiency and effectiveness.



FEEDBACK FROM TEAM

Adrian Elston, Head of Brand, Marketing & Sales Strategy at KeyInvest, emphasised the significant improvements brought by Salesforce. The new ability to attribute activities and resources to specific outcomes has allowed the team to allocate time and resources far more effectively, optimising processes. Everyone at KeyInvest can now clearly see the journey they are on and how it benefits both the company and its members. This transformation has been a game changer for KeyInvest's capabilities.



CLIENT TESTIMONIAL

“ The experience working with *OITC has been excellent.* The support throughout the process and since has been really positive, especially in *helping us understand* what we’re using and how to get the most out of it. They *took the time to understand* us as a business, which is quite unique in what we do for our members. *Helping us customise everything* to our bespoke needs has been really positive. ”

— Adrian Elston, Head of Brand, Marketing & Sales Strategy, KeyInvest



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

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