



FIND YOUR GROWTH PARTNER

# CAPABILITY

## STATEMENT

RIDGE

CONSULTING PARTNER

BY OUT IN THE CLOUDS

APAC Partner  
of the Year  
Awards 2021

salesforce

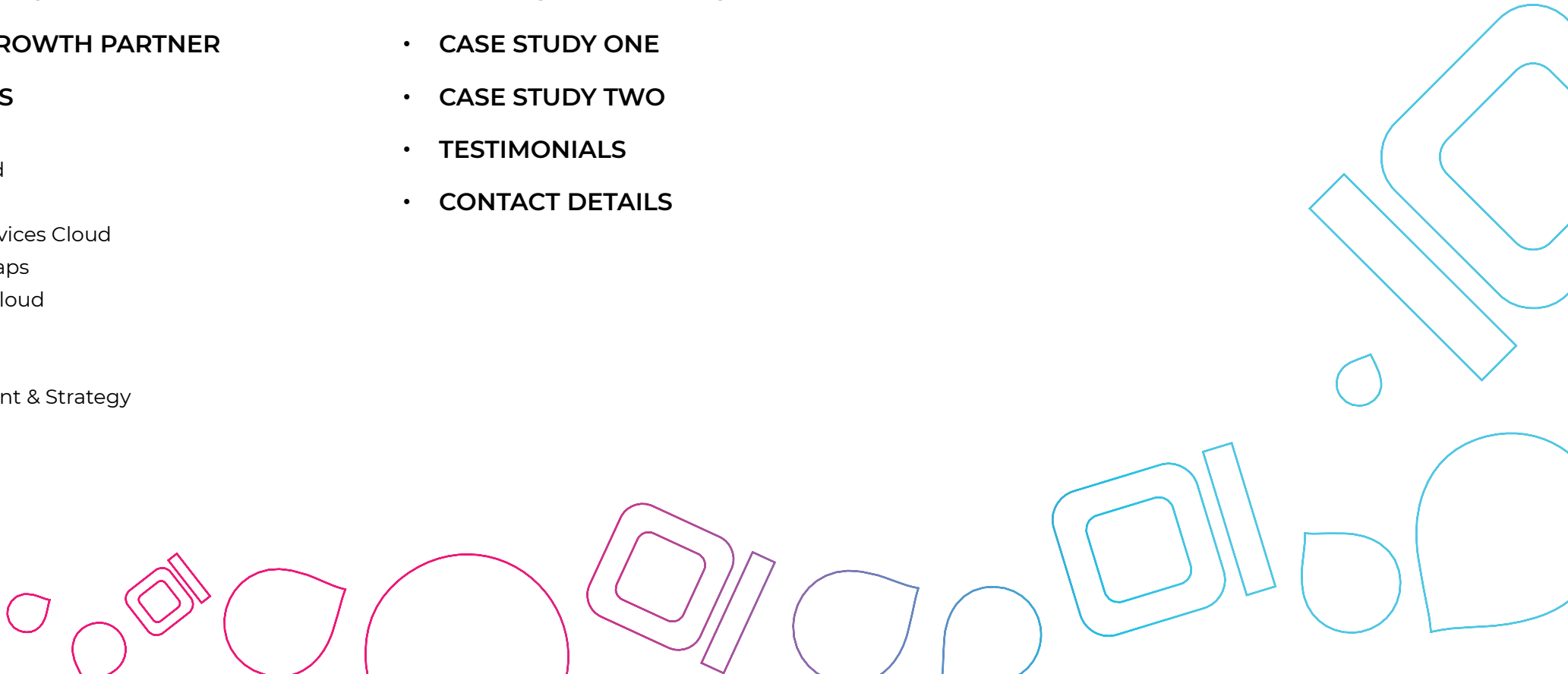


# CONTENTS

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- ABOUT OITC
- OUR MISSION & VALUES
- THE WAY WE WORK
- FIND YOUR GROWTH PARTNER
- OUR SERVICES
  - Sales Cloud
  - Service Cloud
  - Pardot
  - Financial Services Cloud
  - Salesforce Maps
  - Experience Cloud
  - Mulesoft
  - Websites
  - Digital Content & Strategy
- ADDITIONAL SERVICES
- KEY INDUSTRIES
- BRANDS WE HAVE WORKED WITH
- CASE STUDY ONE
- CASE STUDY TWO
- TESTIMONIALS
- CONTACT DETAILS



# ABOUT OUT IN THE CLOUDS

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## FIND YOUR **GROWTH** PARTNER

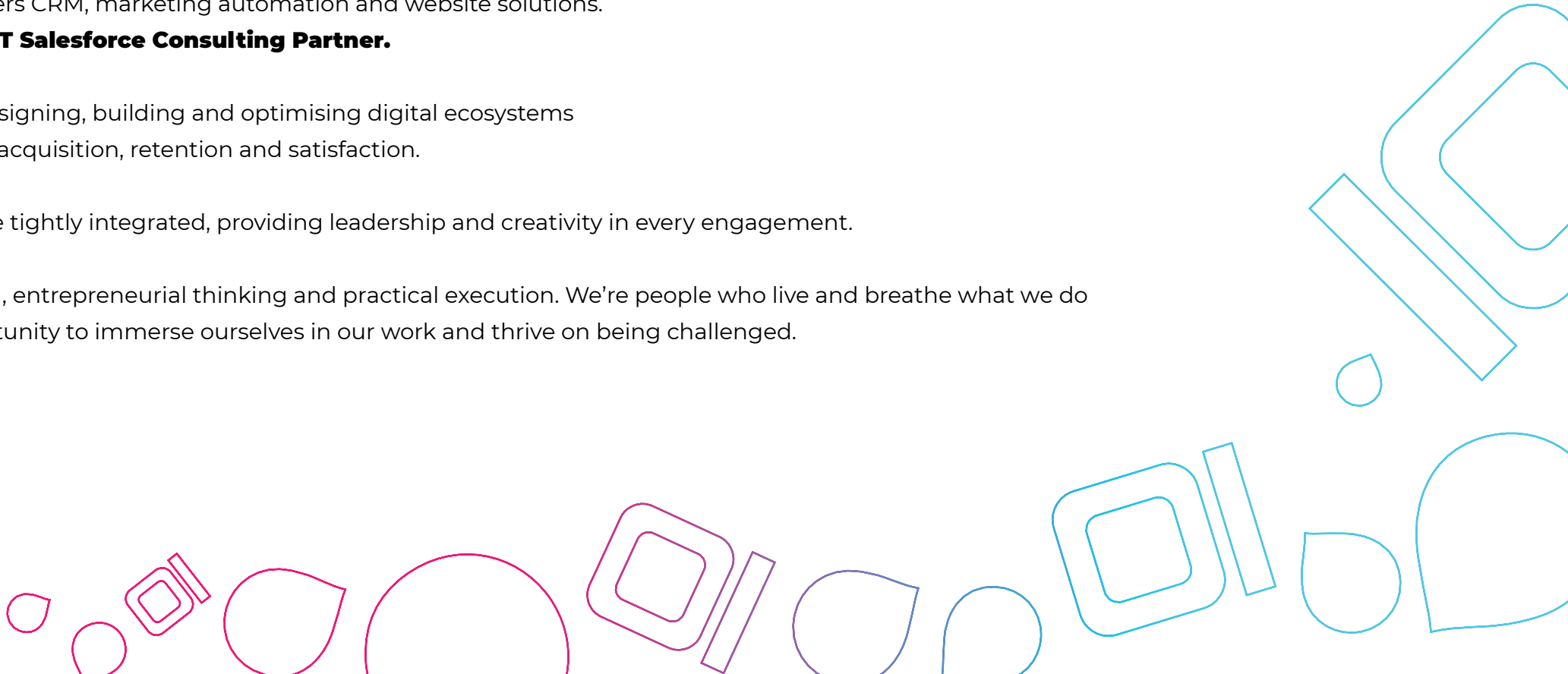
**Out In The Clouds** offers CRM, marketing automation and website solutions.

We are proudly a **CREST Salesforce Consulting Partner**.

Our **central** focus is designing, building and optimising digital ecosystems to increase awareness, acquisition, retention and satisfaction.

Our team members are tightly integrated, providing leadership and creativity in every engagement.

We embody innovation, entrepreneurial thinking and practical execution. We're people who live and breathe what we do and relish in the opportunity to immerse ourselves in our work and thrive on being challenged.



# MISSION & VALUES

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Our mission is to build digital ecosystems that enable businesses to deliver the best possible customer experience at every touchpoint in the customer journey - through a holistic strategy across Website, CRM, Automation and Content.

By nurturing our internal ecosystem that thrives on fun, compassion and positivity, we maintain a team-centric environment that empowers our people to consistently produce creative solutions that push the status quo to future proof our client's businesses.

## NOTHING WORTH DOING IS MEANT TO BE EASY BUT YOU DON'T HAVE TO DO IT ALONE



**REGISTERED  
PARTNER**



**6 YEAR  
PARTNERSHIP**



**150 + SUCCESSFUL  
PROJECTS**



**CONSULTING  
PARTNER**



**GOOGLE  
REVIEW**





## FIND YOUR **GROWTH** PARTNER

### **AMBITIOUS**

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We care about our clients more than anybody else, and we approach their sales and marketing plan like it's our own.

### **DETERMINED**

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Our team is passionate about your success; you will feel this energy throughout the project as we persist to achieve the best results.

### **TEAM CENTRIC**

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Creating a culture of kindness and belonging, where everyone is welcome, where our team can think big and have fun.

### **FUTURE THINKERS**

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We are built to adapt, change and grow with the changing needs of our clients, and work to keep ahead of the game.

# OITC PROCESS



# ECO SYSTEM

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## **SALESFORCE**

The world's #1 CRM brings unlimited value to your business through efficiency, insights and raw selling power.

## **MARKETING CLOUD**

Personalise how you communicate with your customers at scale.

# YOUR COMPANY

## **WEBSITE**

Websites are the new shopfront and most consumers will do research on your business before engaging with it.

## **DIGITAL STRATEGY & CONTENT**

Serving the right content to the right audience at the right time can have a significant impact on your business.





**FIND YOUR  
GROWTH PARTNER**





## LET'S SUPERCHARGE YOUR SALES PROCESS

Sales Cloud will make your processes more effective at every step of the sales cycle - from demand generation, to pipeline management and reporting.

- Generate more leads, close more deals & increase team productivity.
- Accelerate your go-to-market by automating repeated tasks.
- Simplify access by collecting all client data in one location.
- Tailor the platform to your sales team's demands and specifications.
- Optimise processes through time-saving workflows and automation.
- Find more opportunities in your data by leveraging AI generated suggestions.

### INCREASE EFFICIENCY

We build an intuitive and frictionless solution to free up your team so that they can focus on what they do best.

### SUPERCHARGE

Our admins and developers will customise your solution to help you accelerate your business & customer journeys.

### CUSTOM IMPLEMENTATION

After a in-depth consultation with key stakeholders, we will roll out a custom implementation that increases productivity and user adoption.

### POST GO-LIVE WARRANTY

The goal is to build prosperous long-term relationships that allow us to delight our customers consistently.



## RETAIN AND GROW YOUR CUSTOMER BASE

Transform your processes and data into a database that can be employed by your whole organisation, to understand, market-to and nurture your customers and audience better.

- Increase your business efficiency to free up your team so that they can focus on what they do best.
- Resolve cases quicker with clear visibility and a record of every customer interaction — all on a streamlined dashboard.
- Leverage AI to respond faster and more accurately to your customers.
- Customise and automate any customer service or approval process with drag-and-drop simplicity using Flows.

## ENHANCE PRODUCTIVITY

Place customer data and requirements at your team fingertips with a 360-degree view of your customers.

## IMPROVE AUTOMATION

Free up your team by automating everyday, repetitive, multi-step tasks to solve customer issues efficiently.

## CUSTOM IMPLEMENTATION

After a in-depth consultation with key stakeholders, we will roll out a custom implementation that increases productivity and user adoption.

## ON-GOING SUPPORT

Receive on-going dedicated training and support to ensure your staff use the tools correctly and efficiently.





## PERSONALISE HOW YOU COMMUNICATE WITH YOUR CUSTOMERS AT SCALE

Deploy a marketing automation strategy that will give results, strengthen your customer relationships and significantly enhance your business performance.

- Drive customer engagement by automating and personalising your marketing.
- Obtain a well-executed strategy to improve and see an increase across critical metrics like client happiness, retention and revenue.
- Deliver relevant offers and communications to your customer base.
- Increase user adoption with constant access to a skilled consultant who will help get you the answers you need quickly.

### POSITIVE BUSINESS CHANGES

Working with our team, you will see an increase across key metrics like customer satisfaction, retention and revenue.

### BETTER CUSTOMER EXPERIENCE

Delight your customers consistently by providing them with offers and information that is relevant to them.

### BESPOKE CAMPAIGN EXECUTION

Work hand in hand with our team to execute nurturing campaigns that are unique to your business and its customers.

### LOWER ACQUISITION COSTS

Turn more leads into paying customers by serving them personalised content you know they will like, depending on where they are in their journey.

# FINANCIAL SERVICES CLOUD

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**FINANCIAL SERVICES  
CLOUD**



## DISCOVER THE SALESFORCE ADVANTAGES

Financial Services Cloud will help you develop relationships with existing customers and be proactive in assisting new customers. Working as a CRM specifically for the Financial Sector, it is a comprehensive tool delivering the most exceptional financial services for your clients.

- Data model specifically designed for Financial Services.
- The ability to roll up an account so you can get a holistic view of business or households etc.
- Generate powerful reports and analytics to help you service customers sufficiently.
- Increased visibility across your team and the ability to segment customer data.
- Administrators can efficiently deliver new or changing finance data.

### IN-DEPTH DISCOVERY

Our experts will evaluate the market opportunity and identify specific problems, personas and value of solving your customer pain points.

### ACCELERATE EFFICIENCY

Our expert will build a intuitive and frictionless solution to free up your team so that they can focus on what they do best.

### INDUSTRY EXPERTISE

Our expert will work with your business to assess the needs and specific functionality for your financial services offerings.

### COMPLIANCE

We will ensure your customer data is secure and protected, and will perform processes with the highest level of compliance.



## GENERATE MORE LEADS, CLOSE MORE DEALS & INCREASE TEAM PRODUCTIVITY THROUGH THE USE OF AI

Maps will turn your Salesforce experience interactive by presenting all of your data on a Map. Enabling your team to easily observe all of your accounts, log calls, send emails, and generate new events/tasks directly from the Map. It's an all-encompassing data visualization, routing and scheduling, and optimized lead generation system.

- Better manage Sales/Service territories on a map and set boundaries with Map-Based Visualisation.
- Increase your prospecting efforts and marketing campaigns.
- Allow Reps on the road to Schedule their day and prioritize client meetings with Live Traffic Updates with Mobile Compatibility,
- Get new customers into Salesforce as leads based on location.
- Track Reps or Assets directly from Salesforce in real time.

### AMPLIFY EFFICIENCY

We will produce an intuitive and frictionless solution to free up your team so that they can focus on what they do best.

### FOCUS ON BUSINESS

Our admins and developers will customise your solution to help you accelerate your business & customer journeys.

### IN-DEPTH DISCOVERY

Through discovery sessions, we will gain a deep understanding of business processes and customer engagement scenarios to roll out a custom implementation that increases productivity and user adoption.

### CONTINUED SERVICE

The goal is to build prosperous long-term relationships that allow us to delight our customers consistently.



## STAY CONNECTED, ANYTIME FROM ANYWHERE

Drive connections using Experience Cloud and significantly impact the growth of your business for the better. Whether you're seeking to boost sales, enhance customer satisfaction, or/and employee connection. Experience Cloud provides you with the space you need to reach all of your business goals.

- Sharing files and knowledge is effortless and improves employee efficiency.
- Customise your platform, adjust facets including access, and the theme of the portal to meet your company's branding.
- Have access to easy to use prebuilt themes for Experience Cloud pages.
- Foster a collaborative environment among employees, partners and clients.
- Operators can easily share files, access documents, and contribute to ongoing projects.

## TURN YOUR CUSTOMERS INTO ADVOCATES

Create a space that continues to bring them back to the portal to engage with your business.

## EXTEND THE IMPACT OF YOUR WEBSITE

Customise the platform to bring new functionality to your existing business eco-system.

## IMPROVED CUSTOMER EXPERIENCE

We can build a self-service portal: allowing your customers or partners to communicate among themselves.

## ADAPTABLE & CUSTOMISED

We will help your customers or partners get what they want faster by building an intuitive portal suited to their needs.

## SOLIDIFY A TRUE SINGLE SOURCE OF TRUTH

Mulesoft Anypoint enables your business to utilise Salesforce as a true single source of truth by creating a single connection point between your crm and the rest of your tech stack.

- Enterprise grade security
- Updates released in line with Salesforce as its all on 1 platform
- Automate your processes between the different tools in your ecosystem in one place
- Enjoy significant efficiency increases across your business

## INCREASE SPEED TO MARKET

Our experts work with your team to implement the integrations quickly to get you using the product asap.

## INCREASE EFFICIENCY

We will build automated workflows in line with best practice and product experience to take away the repetitive tasks you have been spending time on instead of making more meaningful impact on your business

## MINIMISE TOUCHPOINTS

Having all of your key technology connected means that you spend less time managing data.

## BE SELF SUFFICIENT

Your team will be enabled on how to maintain the tool post implementation and also how to build new flows and connections as required.

# WEBSITE DESIGN & BUILD

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## DESIGNED AND BUILT WITH YOUR END-USER IN MIND

Our team of UX designers and website developers live for creating eye catching, user-friendly platforms that engage your audience.

- Transform your website into a selling machine.
- Tell your story, boost your brand, and draw customers into your business.
- All social roads lead to your website; it is the essential step in closing the sale and driving results.
- Your website pulls everything together. In the days of multi-channel digital marketing, it's all too easy to end up sending mixed messages. Your website can serve as a central connecting point that sets the tone and narrative of the brand for all other channels to follow.

## CUSTOMER CENTRIC DESIGN

All ego gets put aside when planning and designing a customer-centric website. We will help you establish your core audience to ensure their experience on your website is a memorable one.

## MANAGE YOUR WEBSITE EASILY AFTER LAUNCH

We believe that you should be able to manage your website internally if you choose to so we will build it in a way that will give you that option following some post go-live training.

## FUNCTIONALITY PRIORITISED

A frictionless user experience is much more important than a glitter covered animation that greets visitors on your home page. We find the right balance between functionality and user engagement.

## TESTING AND QUALITY ASSURANCE

We focus our development on the business objectives, targeted audience and key messages. We scope websites with clear navigation, taking the user through a sales journey that leads to a call to action.

# DIGITAL CONTENT & STRATEGY

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## FUTURE PROOF YOUR BUSINESS.

- The most effective marketing endeavours are the fruit of extensive research, brainstorming, and planning. We create engaging and compelling communications strategies that have a tangible impact on your business.
- Let us create an experience your clients can easily consume. Draw them in and speak to them on a level they can relate to through captivating elements.
- Explore what makes your service, product, audience and approach different.
- Gain insights continuously, developing feedback loops that make every decision better than the last.
- Embrace multiple channels and platforms to execute campaigns.

### ACTIVATE YOUR BUSINESS

We will design, build, execute and measure your digital strategy to ensure smooth execution and brilliant outcomes.

### CONTINUOUS ENHANCEMENTS

Through workshops, discovery sessions and road maps we will continually improve and optimise everything we do for your business.

### INSIGHT-ORIENTED SOLUTIONS

We work to identify critical opportunities to connect you closely with your customers and a wider audience.

### BESPOKE STRATEGY EXECUTION

Work hand in hand with our team to execute nurturing campaigns that are unique to your business and its customers.

# ADDITIONAL SERVICES

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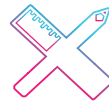
In addition to the four core services, **OITC** also assists clients with additional services on a needs basis.



**BRANDING &  
IDENTITY**



**CAMPAIGN  
MANAGEMENT**



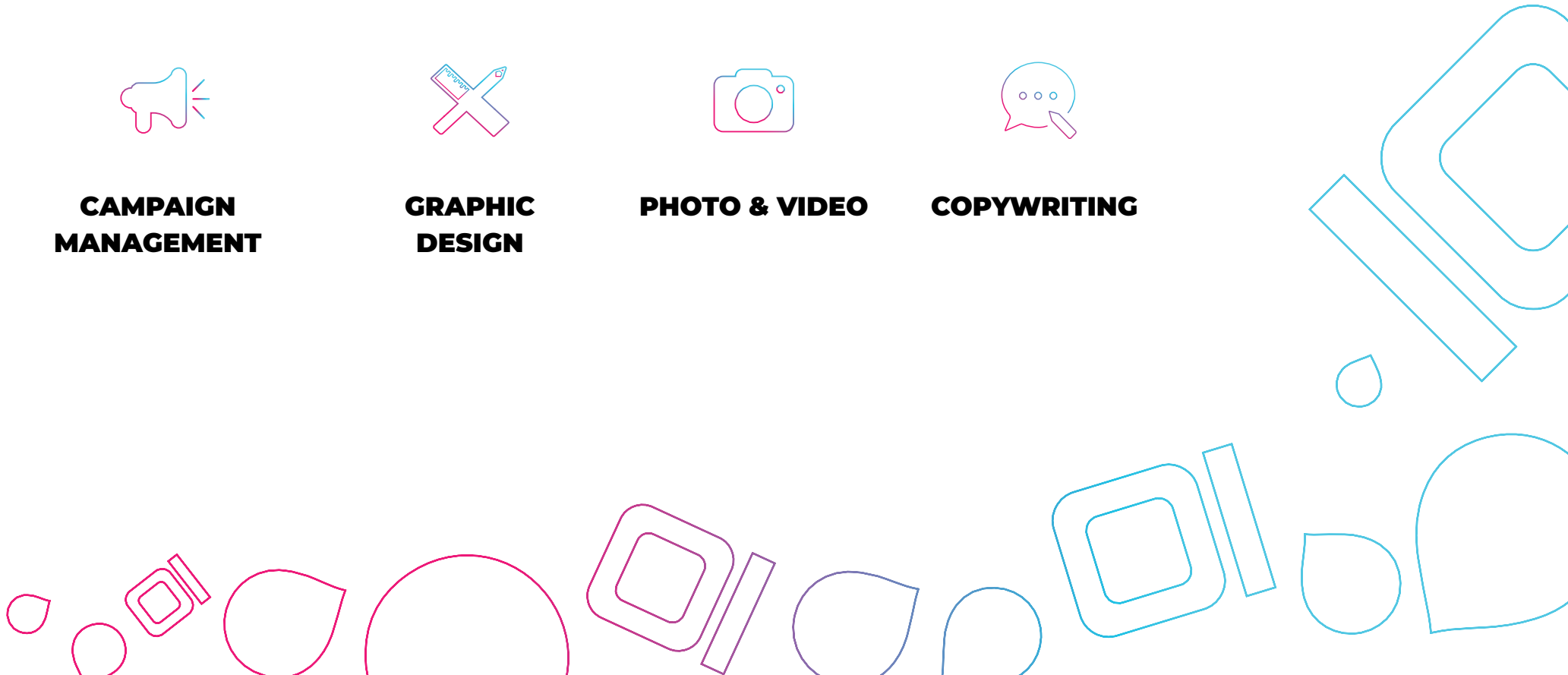
**GRAPHIC  
DESIGN**



**PHOTO & VIDEO**



**COPYWRITING**



# FINANCIAL SERVICE CLOUD

A photograph of a young couple riding a white scooter. The man is in the driver's seat, wearing sunglasses and a yellow shirt. The woman is sitting behind him, also wearing sunglasses and a yellow shirt, with a leopard-print bag. They are both smiling.

afterpay

The logo for DelayPay, featuring a stylized green 'D' shape.

DelayPay

The logo for pay.com.au, featuring a blue square with a white 'P' shape.

pay.com.au

The logo for StockPay, featuring a red 'S' shape.

StockPay



# HEALTH & LIFE SCIENCES





# HITECH

LAB

Daltrey

envato

flare

CONNEXION



# PROPERTY & REAL ESTATE



GROWLAND

ASSEMBLE

NOVAS

buyMyplace



LIGHTS & TRACKS



# EDUCATION

 TEAM TUITION

COURSES

EDUCATION

**Kip  
McGrath™**  
EDUCATIONCENTRES

Inter Care  
TRAINING

 careerhouse

# **CUSTOMER SUCCESS STORIES**







# BALANZ

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



# CUSTOMER SUCCESS STORY

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## THE 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.

## PRODUCTS:

Financial Services Cloud

## INDUSTRY:

Financial Service

## THE 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.



**BALANZ**

# CUSTOMER SUCCESS STORY

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## THE 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.

## THE SOLUTION

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.



# CUSTOMER SUCCESS STORY

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## THE RESULT

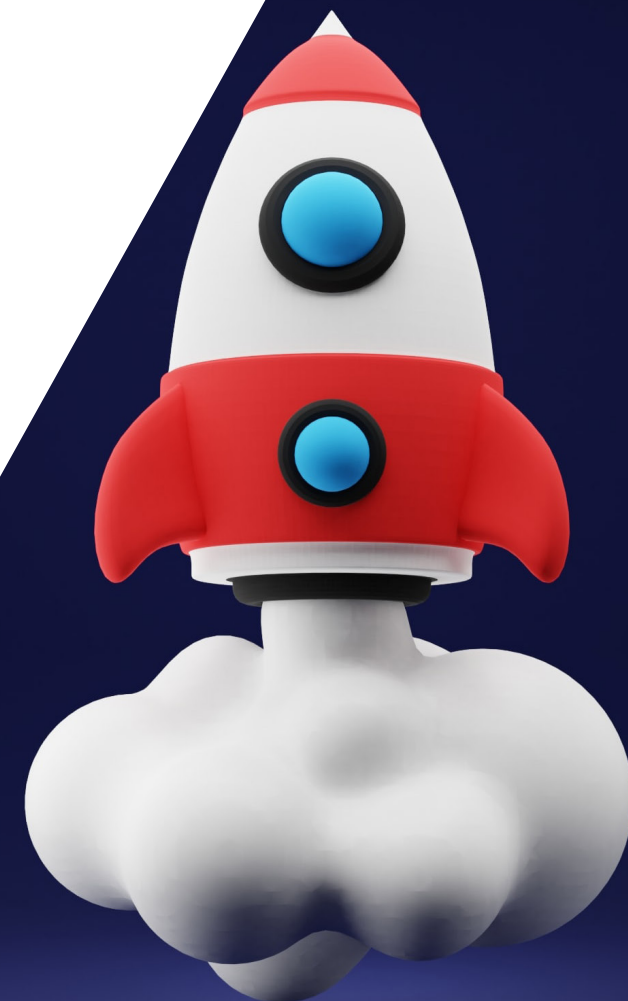
### Streamlined Data

BalanZ 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.

### 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.



**BALANZ**





# CUSTOMER SUCCESS STORY

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## 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."*

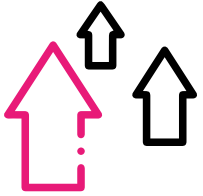
*- Stephen Corbett, Director Balanz.*



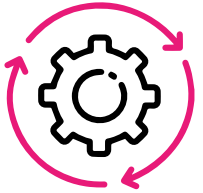
# CUSTOMER SUCCESS STORY

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## 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.



**BALANZ**



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



# CUSTOMER SUCCESS STORY

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## THE OVERVIEW

pay.com.au is an innovative payments platform, helping business owners and directors maximise benefits and rewards across business payments. Their flexible rewards program PayRewards allows customers to earn points on credit cards or bank transfer payments. They can then be transferred to Australia's major frequent flyer programs or used for customised redemptions with a personal shopper.

### LOCATION:

Melbourne, Victoria

### PROJECT SECTION:

Salesforce Implementation

### PRODUCTS:

Finance

### PRODUCTS:

Sales Cloud  
Service Cloud  
Salesforce Knowledge

### PROJECT COMPLETE:

30/07/2020

# CUSTOMER SUCCESS STORY

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## THE OBJECTIVE

To build and execute a new Salesforce Instance to allow pay.com.au to understand their buyer's behaviours and reduce customer service times. Additionally, they required their Salesforce Instance to have the capability to later integrate with their platform via custom API's

## THE CHALLENGES

- The pay.com.au team were unable to track and understand clients behaviours
- Their current setup did not integrate with their payment platform
- They did not have a central system capturing leads from their website
- Ineffective system to deal with Customer Support requests

INDUSTRY:

Financial Service

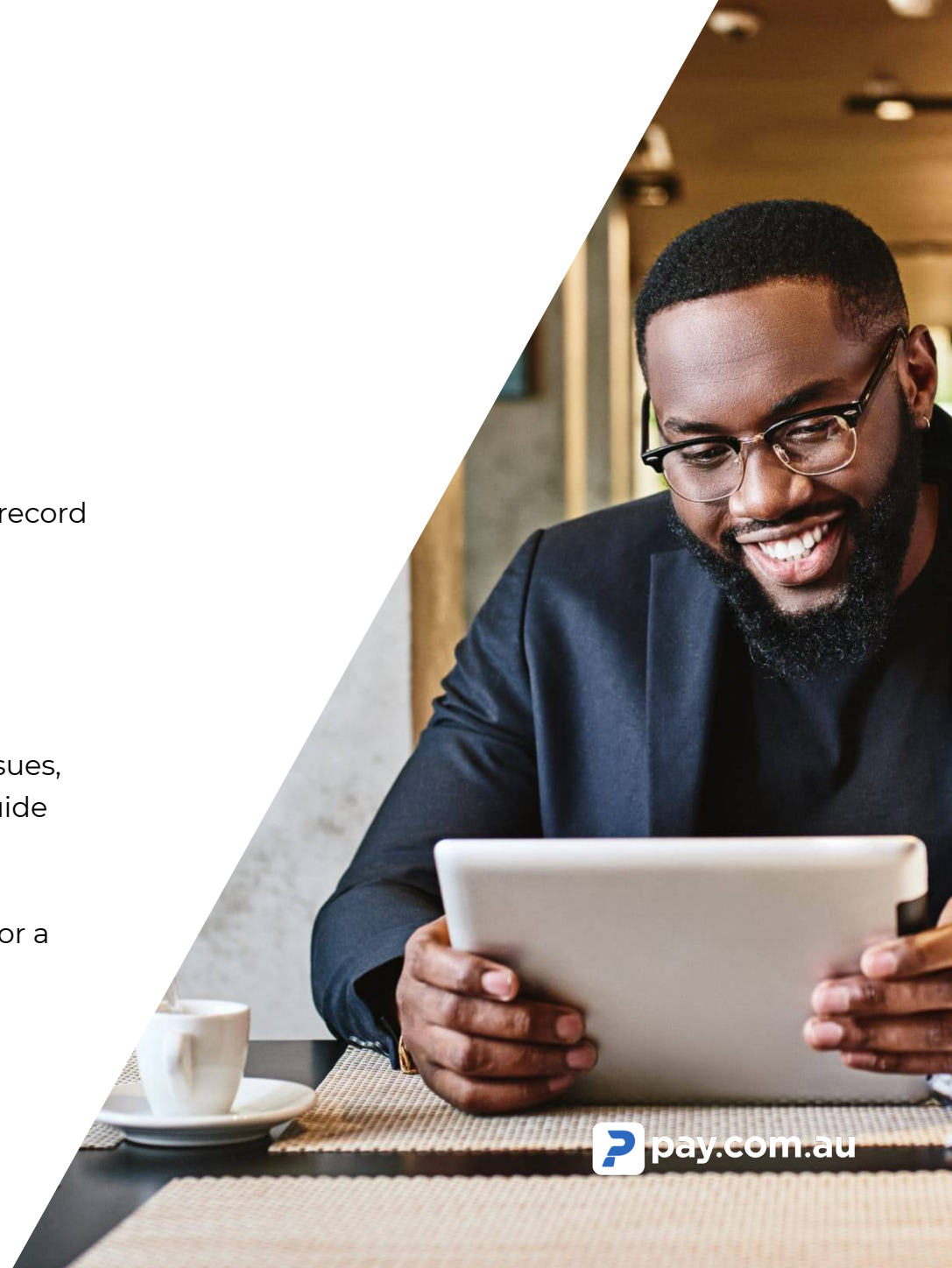


# CUSTOMER SUCCESS STORY

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## THE SOLUTIONS

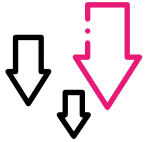
- OITC streamlined their current processes by building an efficient web-to-lead connection between the pay.com.au website and Salesforce, allowing the team to record and work with potential prospects accurately.
- The pay.com.au team can now efficiently create records within their centralised Salesforce database and refer back to records easily at a later date.
- The service team can now promptly create support cases to manage customer issues, with the ability to attach a Knowledge Article for both the user and customer to guide them towards an appropriate solution.
- The onboarding process is now wholly refined, efficient and compliant, allowing for a more satisfying customer and employee experience.



# CUSTOMER SUCCESS STORY

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## THE RESULTS



Reduced support time to customer contact by 63%

**48%**

decrease in administration processes for our onboarding and compliance team.



Vital impact on our overall customer experience.



Allowed for Significant improvement in evaluating compliance when onboarding businesses.



# CUSTOMER SUCCESS STORY

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*"Salesforce has become our source of truth for our customer base.  
Helping our team to deliver a powerful experience to our  
customers at all stages of the customer journey."*

*David Walsh - Head of Digital & Marketing*





# FIND YOUR **GROWTH** PARTNER

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

RIDGE


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](https://OUTINTHECLOUDS.COM)