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Flare

2022

MM+ Implementation Partner of the Year ANZ

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APAC Partner of the Year Awards 2021

salesforce

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COMPANY OVERVIEW:

Flare is an Australian workplace financial services platform and a leading pay and benefits provider, with 1 in 3 employees onboarding using Flare technology directly or through their partners. The business aims to create product solutions that allow for equal payments and benefits for every worker. Flare's pay and benefits app is a digital wallet for payroll and novated car leasing, aiming to support improving employee wellness & retention, streamline workplace operations and efficiently manage compliance.

LOCATION:
New South Wales

INDUSTRY:
Hi-Tech

PRODUCTS:
Optimised Sales Cloud

ADD ONS:
Formstack & Cloud Care

OBJECTIVE

Flare engaged with OITC to rebuild their Salesforce instance to better conform to their existing business process. They required capabilities that would allow them to continue to scale and meet the technology needs of their employees and customers. In addition, Salesforce needed to integrate with several platforms to help create a seamless workflow, allowing them to move toward data-driven processes and a one-stop shop for all departments.

THE CHALLENGES

- Their business processes had shifted, grown and gained complexity over the years, which meant their previous Salesforce instance was not working efficiently for the team.

- Security concerns significantly impacted the business, with confidential information being communicated via email. (Proof of work, bank statements, etc.)

- There was poor communication between departments. With time being wasted on follow-ups and double data entry.

- Employees found the existing data collection method time-consuming and allowed for human error.

- There was a gap in their customer journey - with Customers having nowhere to check the status of their applications.

SOLUTION

The first step was to thoroughly understand the business needs and challenges across each team within Flare. Then, through several extensive discovery sessions, OITC was able to suggest the right products and solutions to take Flare into its next phase of business.

OPTIMISING THEIR SALES CLOUD HAS:

- Improved the overall visibility of their customer journey. The new build allows Flare customers to complete an application online without using time-consuming tools like emails and phones - helping speed up the onboarding processes.

- Provided the security needed to store sensitive customer data.

- Allowed for a more accurate data collection to be utilised for future marketing strategies.

- Enhanced workflows and improved internal processes with the successful integration of Experience Cloud and their existing platforms.
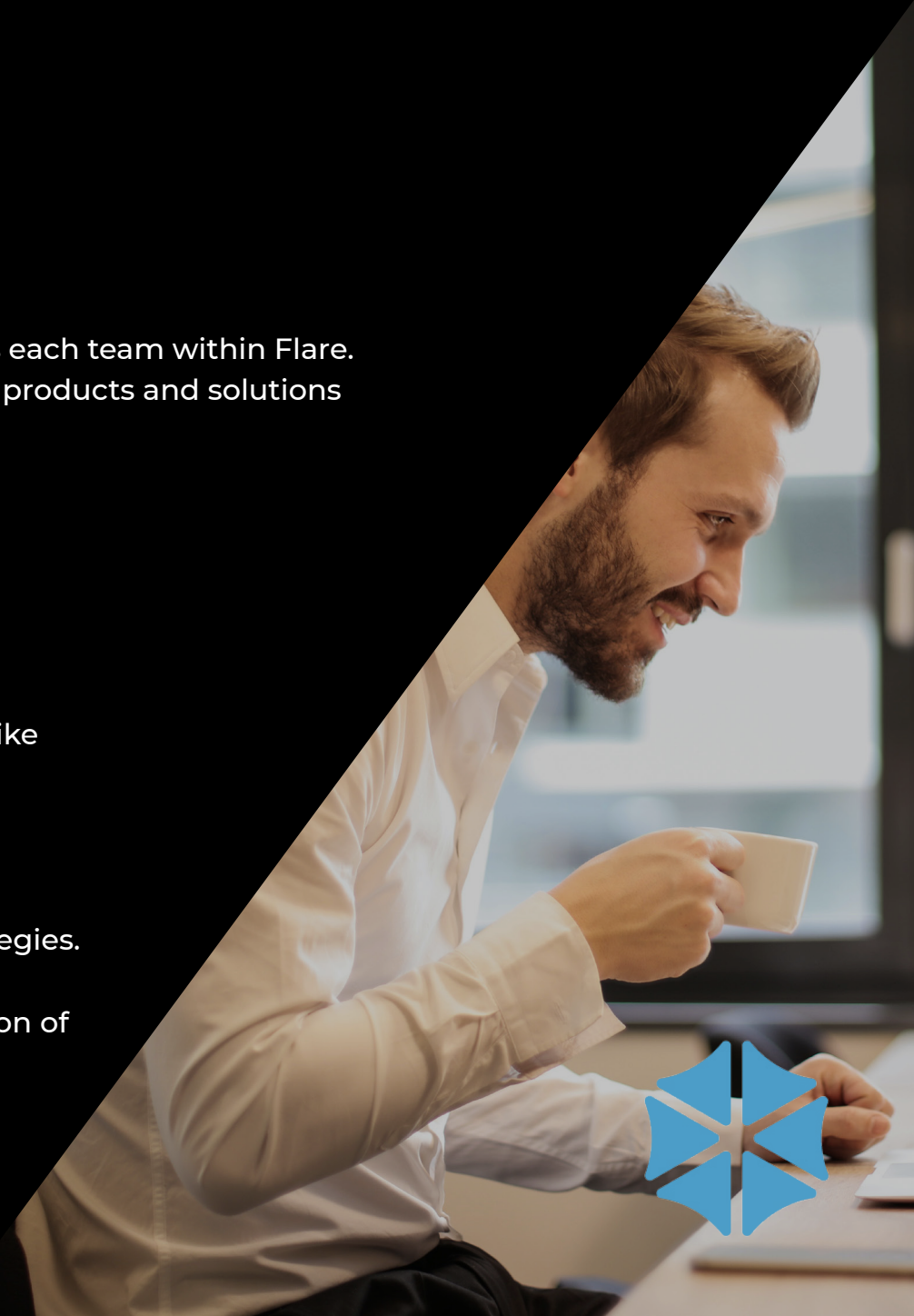
RESULTS

- The new Salesforce build has allowed Flare to automate internal processes, improving efficiency and reducing the likelihood of human error, double-handling and miscommunication between various departments.

- Having the right build and solution has freed employees to focus on the more critical aspects of the business.

- Data accuracy has improved, as has the flow of information between marketing, sales and support, which has resulted in improved customer experiences.

- Updating Salesforce capabilities has meant their integrations are correctly speaking to each other and has increased platform usage.

- Employees report fewer hurdles in using Salesforce, with all departments able to follow and update customer interactions coherently.
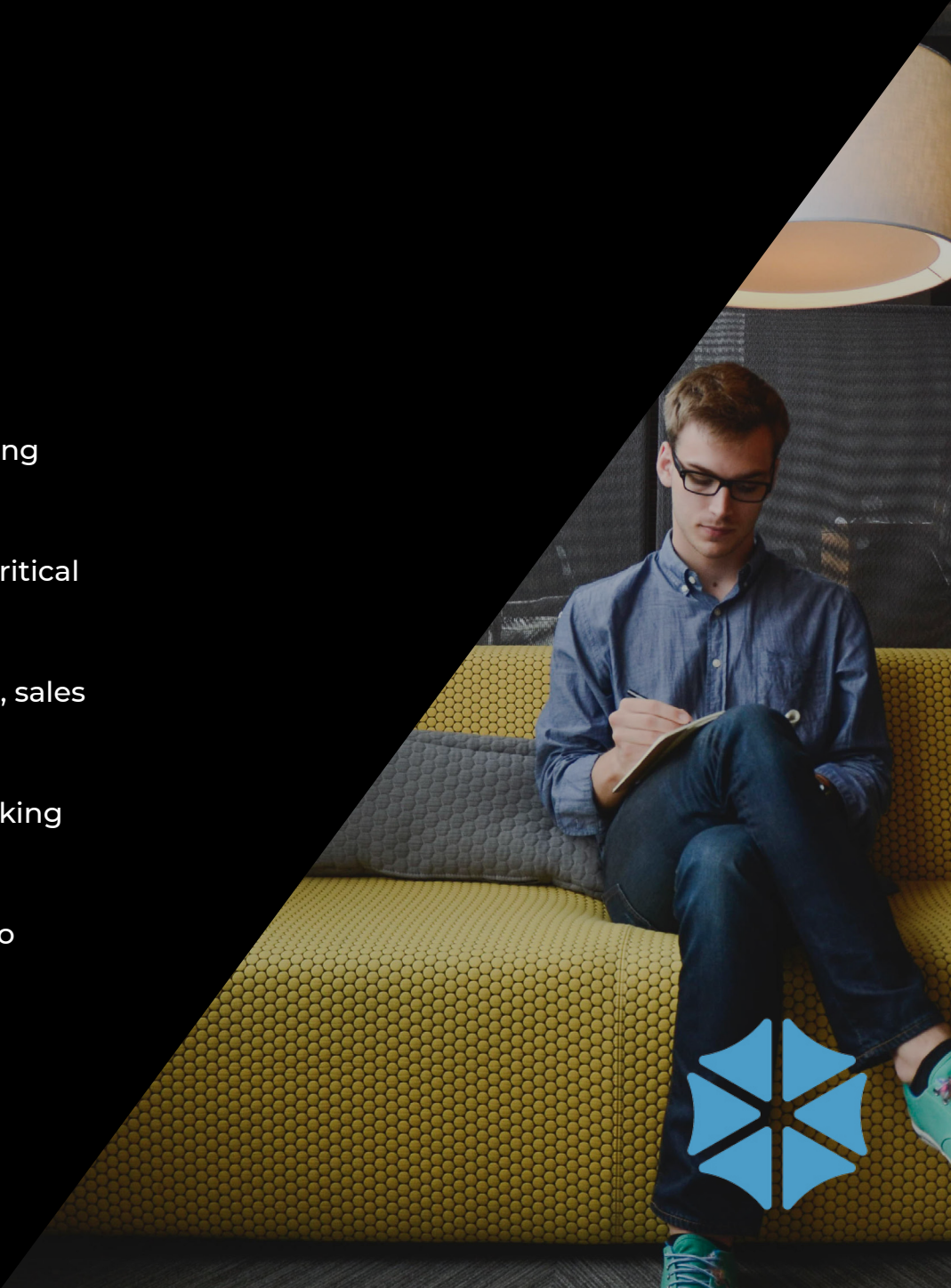
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"We had an excellent experience with OITC, notably the team's attention to detail; they really took the time to understand our business and offered meaningful solutions to fix challenges; the solutions were long-term and sustainable. OITC was extremely responsive at all stages of the project."

- Janine Fry - Head of Strategy at Flare

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

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