



FIND YOUR GROWTH PARTNER

PGA Advisory

Customer Success Story

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

CREST

CONSULTING PARTNER

BY OUT IN THE CLOUDS

APAC Partner
of the Year
Awards 2021

salesforce





PGA

A D V I S O R Y



OVERVIEW:

PGA Advisory provides property insights.

Their team analyse market trends to uncover data and insight to make accurate predictions and identify high-growth locations across the country for investors around Australia - with exclusive access to off-market properties and a nationwide network of industry experts to help get the ideal results for each investor. From beginning to end, they are there to guide the way, providing mentorship and tailored strategies for a stress-free and profitable property journey.

PRODUCTS:

Pardot

LOCATION:

Victoria

INDUSTRY:

Wealth Advisory

The Objective

PGA Advisory first partnered with Out In The Clouds in 2020 to build their Salesforce instance. They again engaged with OITC early this year to lead their Pardot implementation.

The PGA Advisory team identified the need to improve their marketing efforts and CRM to provide greater reporting and pipeline management visibility, enhance marketing efforts, and gain real-time insight into customer journeys.

The Challenges

With continued business growth, PGA Advisory identified they needed a robust Marketing Automation engine to help Sales collect and manage accurate customer data and enhance their marketing efforts. As an existing Salesforce customer, they wanted a solution that would integrate natively into their current processes.



The Solution

OITC built a tailored Pardot instance; the powerful features activated were:

- Pardot's source-tracking ability, OITC built out lead acquisition forms allowing prospects to enter Pardot and sync to their CRM build seamlessly,
- Creating automation rules that trigger email messaging and scoring
- Working together with their marketing team to create email templates and migrate existing external templates into Pardot
- OITC successfully synced Pardot and Salesforce with source information - enabling information via the Pardot form/s to automatically update a prospect's data in Salesforce in real-time; this data then triggers automation that supports sales and marketing objectives.

OITC also provided the PGA Advisory team training on Pardot's key features and communicated best practices when building their Engagement Program and other related automation.



The Results

- An ROI of 300% in under three months, thanks to the successful implementation and employment of Pardot.
- Their Pardot Instance is synced with Salesforce - allowing for efficient communication between the two platforms.
- A seamless connection between Pardot and Salesforce allows the team to maintain data integrity and confidently run automated personalised messaging that delivers content to the right people at the right time.
- The power of Pardot allows their marketing team to create effective engagement journey's for current and prospective clients and to re-engage with inactive clients.
- Pardot has allowed for better collaboration across teams and has increased visibility and accuracy with B2B marketing analytics in real-time.



The Specific Results

MORE
EFFECTIVE MARKETING
CAMPAIGNS BASED ON
CUSTOMER **BEHAVIOURS.**

300% ROI IN UNDER
THREE MONTHS - **THE**
POWER OF DATA IS
UNQUESTIONABLE

INCREASED REAL-TIME
DATA HAS IMPROVED TEAM
COLLABORATION &
ENGAGEMENT



“OITC, were really **professional** and understood what we were trying to achieve throughout the implementation, and the **ongoing support** has been incredible.”

- Ben Petterson,
Head of Marketing at PGA Advisory.



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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