

Creating better customer experiences

How process improvement has enabled new levels of customer obsession for a premier boutique wealth management advisory firm.



"Everything we do is about improving the experience and results for our customers. Put simply, Elements has revolutionized the way we map processes in our business, resulting in a more efficient and streamlined process with highly effective results."

Neil Moodley, CEO
<http://www.infusion360.com.au>



Overview

InFusion360 is a boutique wealth management business providing a unique and comprehensive financial solution to time-poor professionals such as doctors. In this business, trust is everything. Our reputation for high quality services within the professional community is our key to success.

One of our core values at InFusion360 is innovation. We saw the opportunity to embrace digital transformation to further enhance the quality of the services that we offer to our clients, and selected Salesforce as the platform that would help us to achieve this.



The challenge

Consistent and efficient processes are vital for us to achieve the business goals of regulatory compliance and customer satisfaction. A key step to success on the digital transformation journey was the documentation of these processes and how they connected with each other. This would also enable our broader vision of automation using Salesforce. However, we did not have an effective platform to document or visualise the process maps.



What was done?

We were referred to Elements via the Salesforce network. The ease of use allowed us to commence mapping out several business processes and we quickly realized the potential of this software from a broader business perspective. We were not only able to map the business processes, but also gain an understanding of how they interacted with each other and the resources required at each step. This made it easy to review our current processes and understand how we could improve them going forward.

Being a business that operates in a highly regulated environment, having documented processes with versioning is critical to support our compliance obligations. We are now using the software to build our procedures manual and the version control capability to track changes.



Benefits and outcomes

The ease of use has made adoption across the business easier, which has meant a more efficient and consistent sharing of "company knowledge". The ability to visualize processes has encouraged feedback and led to process improvements and efficiency gains. This has been a crucial step for us in automating processes within the business.

A year ago, our business systems were good, but too many processes were stored in people's heads. We wanted to go from good to great and now, most of our business processes are fully documented in Elements.

This has:

- ✓ Greatly facilitated staff onboarding and training, process testing and improvement, and systems automation.
- ✓ Resulted in regular and detailed feedback on our processes from within our team. This feedback is reviewed by leadership, then implemented per approval.
- ✓ Led to the review and improvement of eight key business processes during a two-week period, which were then revised in Elements and rebuilt in our Salesforce process automation app, Process Composer.
- ✓ Delivered greater efficiency and improved client satisfaction.