

OMNIWEALTH

ISSUES PRIOR TO DWR ENGAGEMENT

Omniwealth had implemented Salesforce but the uptake from the team was poor and use across the teams were limited. Of the 65 staff in the business only 6 were actually licensed and using Salesforce.

The business is growing quickly and needs a platform that works for the different teams and is embraced by the whole company.

James Grima MD of Finance said "If we can't get Salesforce working we will have to look at alternatives. Our staff struggle to find what they need easily and are wasting a lot of time. The structure is confusing and reporting just doesn't give me what I need to effectively manage the team."

THE SOLUTION

- DWR were engaged to review system configuration and build a roadmap to improve engagement and adoption and upgrade functionality to meet the current and future needs of Omniwealth.
- Starting with quick wins DWR created profile-specific pages and dashboards that focused on what was important to the different users without unnecessary distractions.
- After reviewing business processes with users DWR identified improvements in design that ensured system processes were aligned to business processes, improving ease of use and compliance to audit requirements.
- DWR introduced Omniwealth to integrated digital marketing capabilities of the platform.
- DWR provided subject matter expertise to Omniwealth advising on the potential to be gained from Salesforce and optimising return on investment.

THE RESULT

- The team are embracing Salesforce with excitement for the future of the system and the wider business units are likely to purchase licenses.
- Management has a single view of the business through personalised dashboards.
- The Home Page became the activity centre for Brokers creating efficiencies in processing applications and less missed opportunities.
- Compliance was improved through improved design and process alignment.
- Omniwealth are developing their Salesforce roadmap in collaboration with DWR.

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