

# All

# About

# beam.

Part of Australian Retirement Trust Group, Beam revolutionises the way companies look at super.

Beam is an integrated supertech solution that delivers a brilliant super payment experience for many Australian software providers and their customers.

With such an innovative offering, Beam needed an effective CRM system to match. The team at Beam reached out to SalesFix looking for a scalable Salesforce solution to enhance their customer experience and onboarding process. This is their customer success story.

# The Opportunity

Increasing data quality   Increasing transparency   Unifying processes

The newest addition to the Beam team, Josie Armao, Manager of Partnerships and Growth saw the need to change the way her team was working. Having a previous background in Salesforce, Josie knew the difference it could make to saving time and providing great experiences.

The challenge Beam faced was understanding the existing gaps in their sales and customer journey to better deliver a comprehensive and consistent end-to-end customer relationship across all touch points with Beam.

*“We were not using Salesforce to its full potential. We wanted to better support and enhance customer relationships through the sales journey so we needed to refine how we used Salesforce.”*

*- Josie Armao*

# The Turning Point

Josie knew the task of getting Salesforce to where they wanted was a big job that she couldn't do alone, so they looked for experts to help them.

Josie and her team chose to engage SalesFix because of our track record of delivering solutions that are intuitive and can grow with their organisational needs.



# Why SalesFix?

One of the driving factors for Beam choosing SalesFix was that our team go beyond just implementing a Salesforce solution. SalesFix becomes part of an organisation and really understands the pain points and future goals. This was no different for Beam with the SalesFix team working onsite on a regular basis to really understand their organisation and deliver the best outcomes.



*“Obviously, I can say I've dealt with a lot of people and a lot of companies and since I've been with you guys honestly hats off to your leadership. You've done an awesome job. You've got great processes.*

*It was seamless and easy and it made a difference for me, my people and my customers. It makes me proud when I'm out in the business telling everyone who we work with.”*

*- Josie Armao*

# The How

After working with Beam to understand their needs, the SalesFix team created a solution that would help elevate and further streamline the Beam sales journey from new enquiry right through to becoming a committed new partner. The solution, using Salesforce Financial Services Cloud, brought data and customer experience together to allow Beam to enhance their sales funnel to facilitate quality customer relationships and boost their conversion of new customers.

Key outcomes for Beam:

- Easily digestible reports and dashboards
- Data migration for a seamless transition
- Increased security through authentication
- Enhanced sales and onboarding journey for a more enjoyable customer experience
- Request for information form for easy capturing of data
- Outlook integration to streamline all communications



*'At SalesFix we help organisations achieve their vision.*

*They are the experts in their company and we enable them to succeed ”*

*- Katrina Lee, SalesFix Lead Salesforce Consultant*

# The Now

*“SalesFix allowed us to accelerate well beyond what we are able to achieve alone, creating huge value in a short amount of time”*

*-Matt de Largie  
Product Manager, Beam*



## Supporting growth initiatives

With the help of SalesFix and Salesforce, Beam was able to apply strategies that helped produce positive results to the growth initiatives of the business.

### End-to-end

A continued focus on delivering a simple and standardised end-to-end onboarding experience and process for all customers across all touch points with the Beam team.

## 100%

All of Beam's team are loving the new system.

### Centralised Data

All of Beam's data is in one convenient location, allowing for greater transparency across all team members.

# What's Next?

At SalesFix, we're not just about selling solutions; we're about making genuine connections and solving real problems. Let's have a chat and see how we can help you.

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