

A man and a woman are high-fiving in an office setting. The man is on the left, wearing glasses and a light blue shirt. The woman is on the right, wearing glasses, a white jacket, and a white top. They are both smiling and looking at each other. In the background, there is a bookshelf with several books.

**online**  
business systems



ACCELERATE, GROW AND TRANSFORM

**Salesforce**

# What we do



Online Business Systems (Online) is a digital transformation and cybersecurity consultancy.

Since 1986, we have been using technology to deliver dramatic business results for companies around the globe. Our borderless philosophy connects our team of 400+ world-class technology professionals with the right environment, regardless of their location.

More importantly, we've learned the value of business partnerships and of mature management and implementation methods as critical factors for successful delivery.

## The Onliner Code

*Caring and Empathy*  
We look out for each other

*Passion*  
We are energised by what we do

*Integrity*  
We do what's right

*Forward Thinking*  
We are always evolving

*Commitment & Perseverance*  
We finish what we start

## DIGITAL TRANSFORMATION

## CYBERSECURITY



Results. Guaranteed.



A man with a beard and short dark hair, wearing a light blue button-down shirt, is shown in profile, looking towards the right. He is in a meeting room. In the background, there is a corkboard with a sign that says "DIGITAL STUDIO" and a whiteboard with pink sticky notes. The overall lighting is dim and blue-toned.

**Welcome to the experience economy**

**Accelerate Business Growth with  
Personalized Digital Experiences**

**online**



# The demand for superior personalized digital experiences

63%

of business buyers say most customer experiences fall short of what they know is possible

68%

of customers say advances in AI make it more important for companies to be trustworthy

73%

of customers expect better personalization

80%

Customer experiences should be better considering all the data companies collect

A background image featuring a financial candlestick chart with various colored bars (red, white, green) and several overlaid trend lines in orange, green, and blue. The chart is set against a dark blue background with a grid of dotted lines.

**How can your business meet these  
rising expectations and deliver  
personalized experiences to  
accelerate growth?**

# Customers and business demand more

**50%**

of CEOs want  
ROI in one year

Customers

**73%** Expect better  
personalization

**79%** Expect consistent  
engagement

CIO, CXO, CFO

How do I scale?

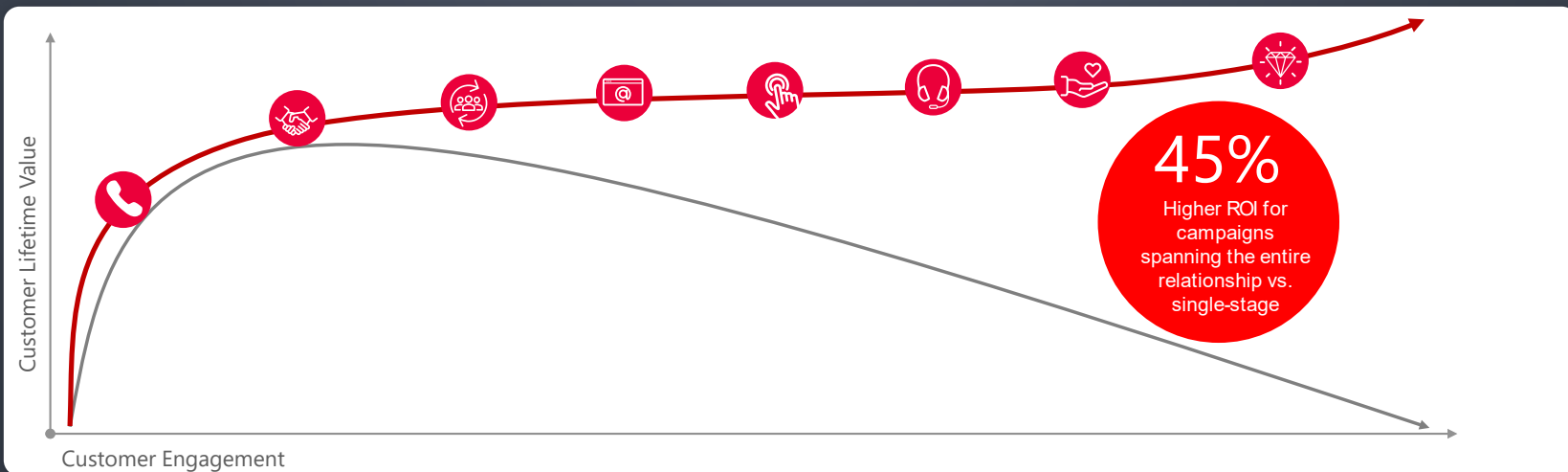
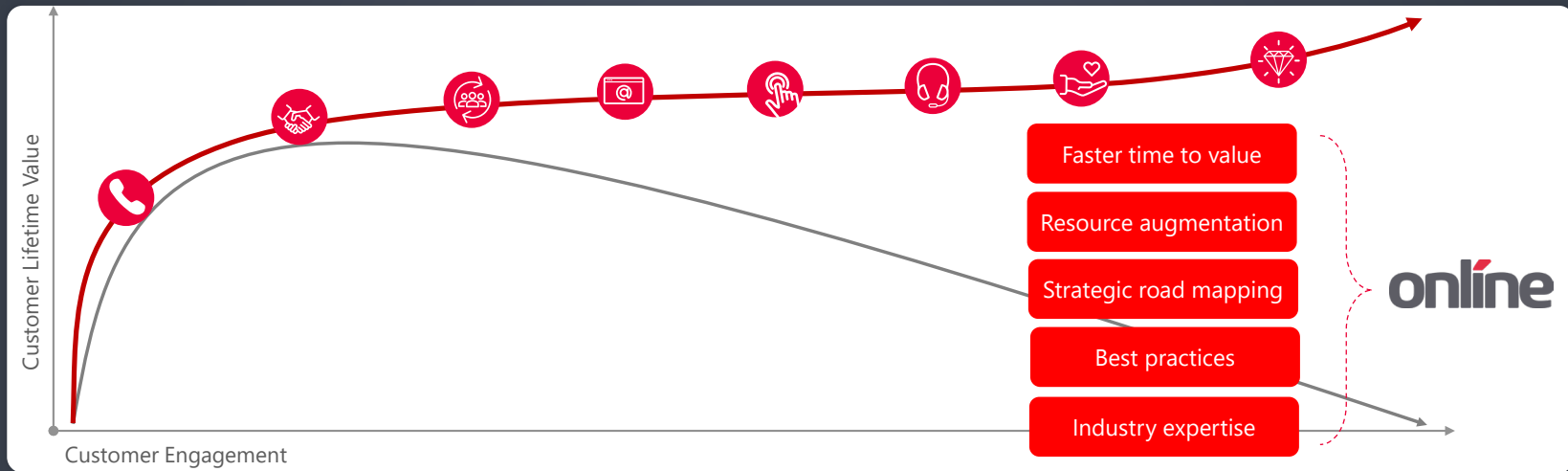
How do I turn my data into impact?

How do I make customers feel valued?

# Disconnected relationships hurt growth

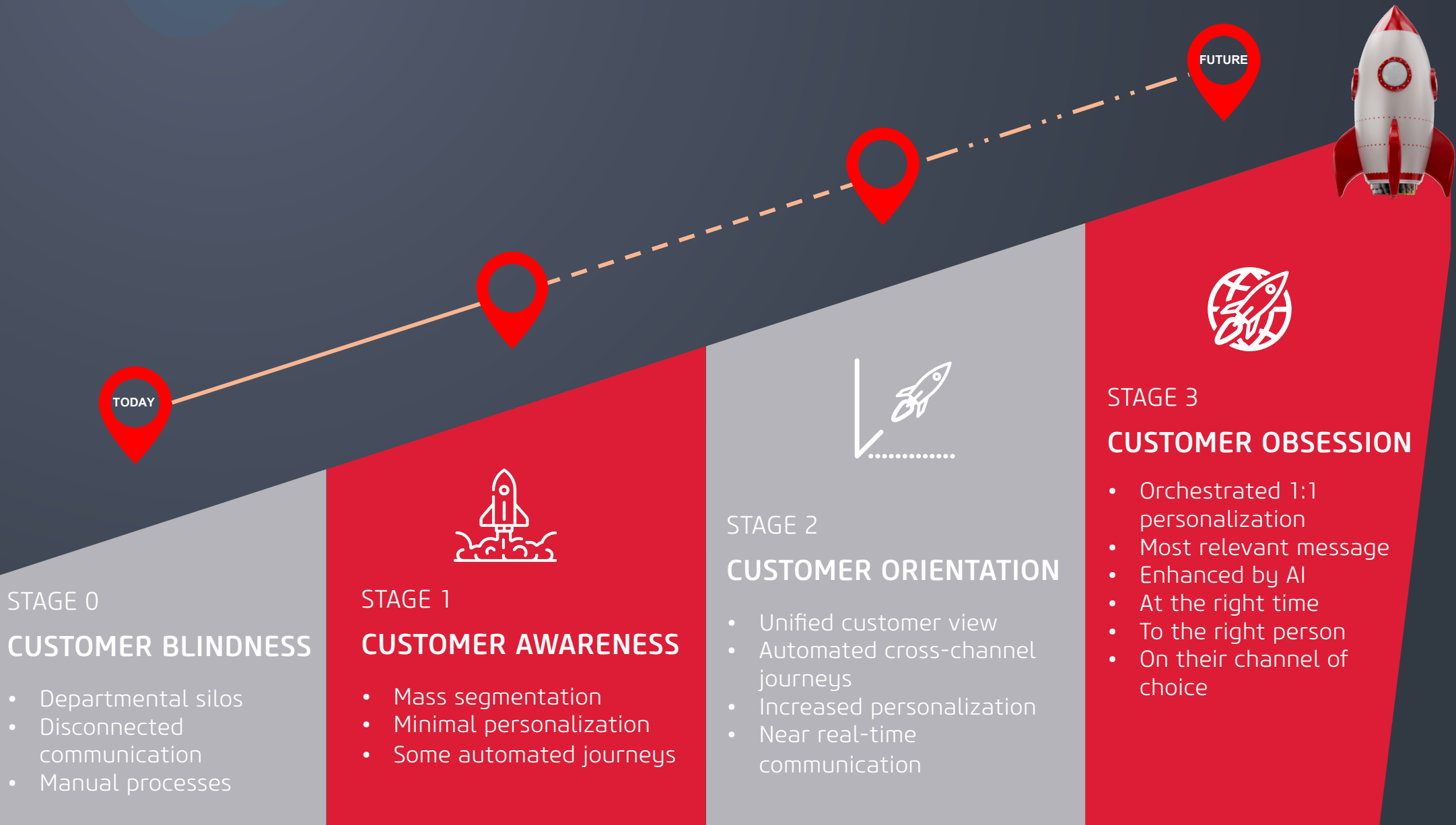


# It's a new way of thinking connections





# Launch into Personalized Digital Experience



# Online helps accelerate business growth with **Salesforce**

Customers today demand more, and this is why we deliver Salesforce solutions.

## SALESFORCE EXPERTS

Our team of Salesforce and Marketing Cloud Certified Consultants brings extensive expertise, serving clients across Canada and the globe.

## 100+ CERTIFICATIONS

With over 100 active certifications spanning the entire Salesforce stack, we ensure top-tier proficiency and knowledge.

## 100+ PROJECTS

Over 100 Salesforce projects Delivered, driving impactful business transformations and customer success.

## NORTH AMERICA

Our dedicated Salesforce team supports clients throughout North America, providing localized insights and personalized service.

# Our approach

We understand that [Salesforce](#) is not black and white, but instead is many shades of gray.

## EVERY ENGAGEMENT IS IMPORTANT

Online's Salesforce team works closely with our Clients to understand the business goals and aligns those goals with technical solutions built on Salesforce.

Our approach is to put business needs and the end users first. We follow an Agile methodology or Agile Approach. In this approach, instead of unveiling the finished solution at the end of the project, the team will work in an iterative and incremental manner within small time-boxes, known as sprints, to produce a working solution at the end of each sprint.

This means we have a continuous planning and feedback loop that ensures that the project team can align the delivery to the business needs.



### DO THE RIGHT THING

Our size and culture enables us to do the right things for our Clients, without the constraints common in large organisations.



### EXCEPTIONALLY RESPONSIVE

We strive to be nimble, attentive and easy to work with. This is part of Online's DNA, and is foundational to every engagement.



### ALIGNED LEADERSHIP

Our leadership team has been working together for years, understands security engagements, and strategically puts the right consultant in the right roles.



### POWER OF ONE

Our consultants are highly collaborative and leverage the collective experience of the entire team.



### BUILT ON SECURITY

Cybersecurity is the foundation of anything we build.

## OUR COMMITMENT TO EXPERIENCE AND DELIVERY EXCELLENCE

“ Experience matters. It would have taken our team significantly longer to implement the solution, and it would not have been as complete. ”

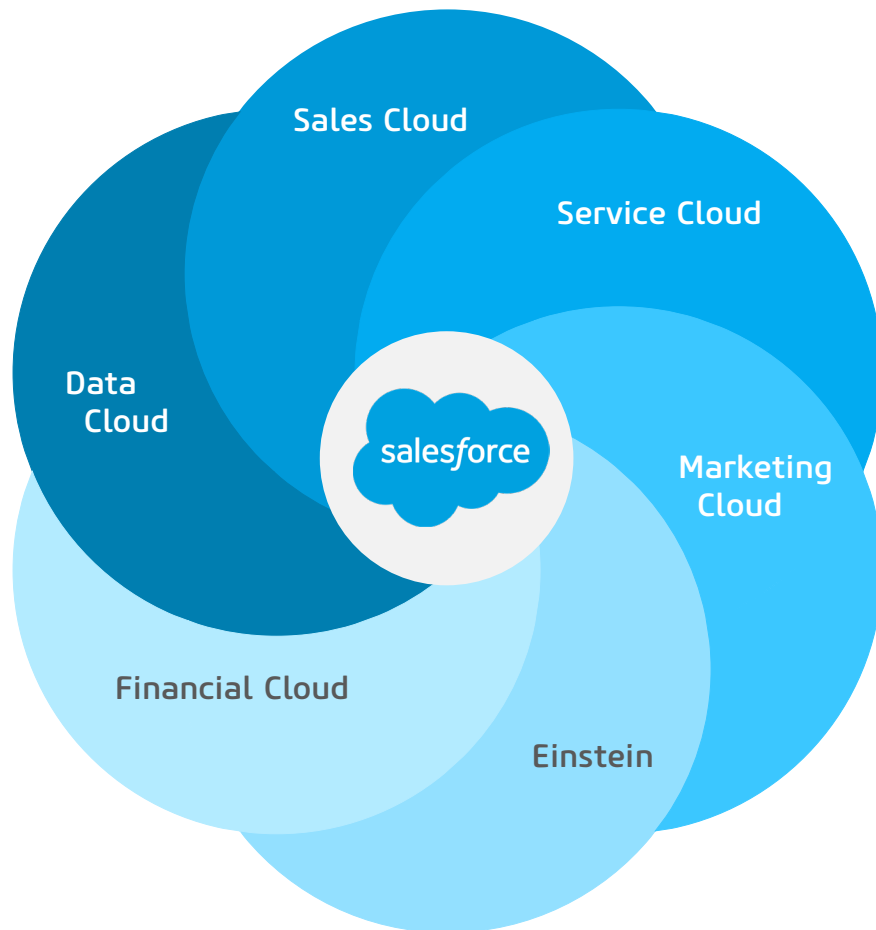
– AGI, VP, Customer Experience

 Results. Guaranteed.

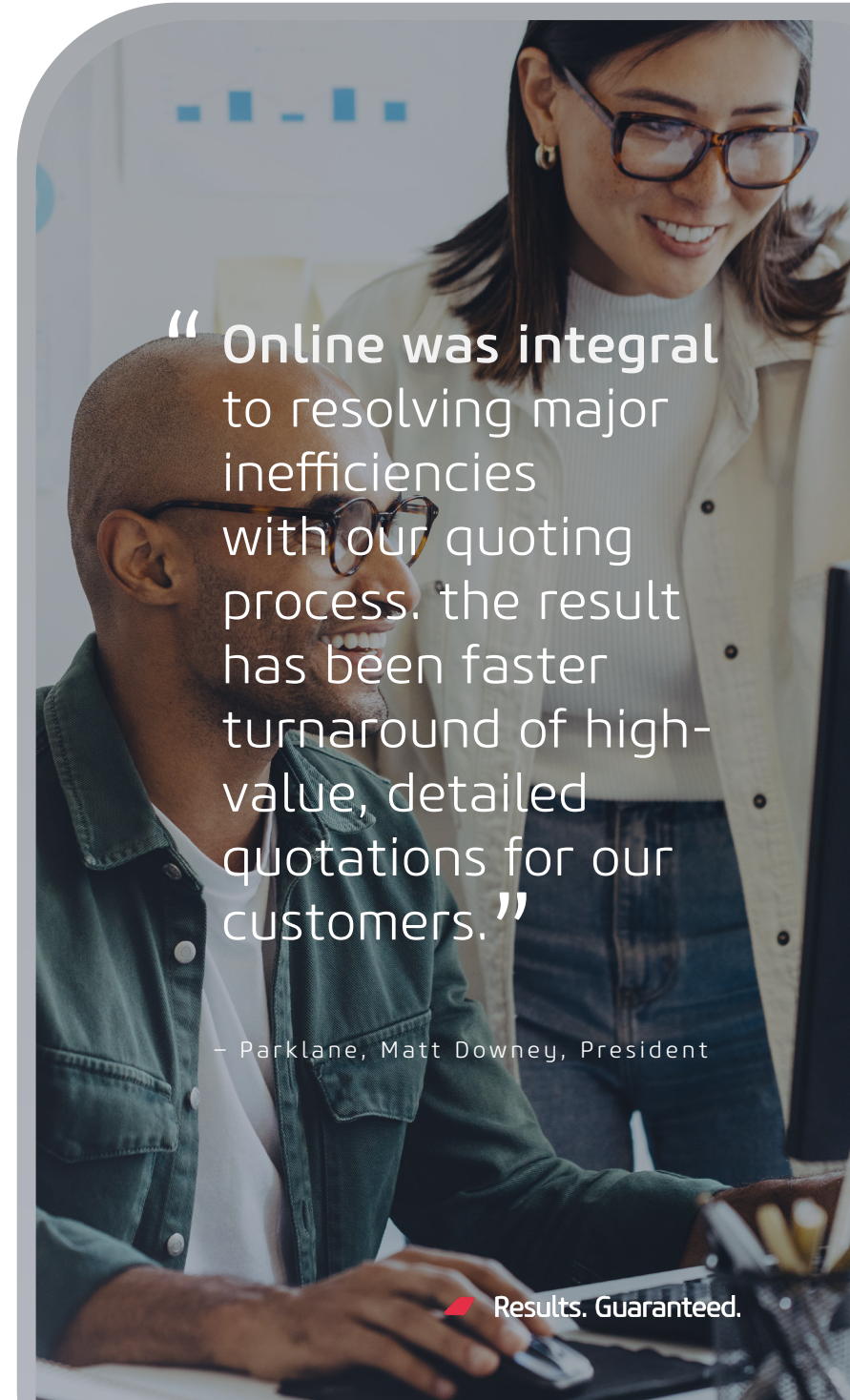


# Expertise That Accelerates Growth

Online's team of Salesforce experts helps our clients realize the full benefits of Salesforce and connect the dots to accelerate their business securely.



**online**



“ Online was integral to resolving major inefficiencies with our quoting process. the result has been faster turnaround of high-value, detailed quotations for our customers.”

– Parklane, Matt Downey, President

 Results. Guaranteed.



# Case study

CWB National Leasing, Canada's largest equipment financing company. They provide a full range of financing services in agriculture, construction, transportation, forestry, health care, commercial, and golf and turf equipment industries

## The Challenge

CWB National Leasing was seeking ways to improve their customer engagement and required a single, comprehensive view of their clients that could be shared across the entire business.

For more than a decade, the business had been using Salesforce Classic for all its customer support requests. They needed to migrate to a more modern, agent-focused user experience in Salesforce Lightning that would enable their agents to communicate seamlessly across multiple channels.

**online**



## The Approach

By working closely with Online as a trusted advisor, CWB made the following enhancements:

- > Created a framework for technical development, change management, and data governance.
- > Implemented Financial Services Cloud for a unified customer view, enhancing client relationships.
- > Migrated to Salesforce Lightning and created a custom app with Lightning Service Console for better agent productivity.
- > Added Salesforce Omni-Channel for Service Cloud, integrating communication channels for real-time broker-customer connections.
- > Integrated Salesforce with live chat and mobile messaging, enabling personalized support through SMS and popular

## The Results

By spearheading the business' transition to Lightning, Online delivered a modern Salesforce solution that increased operational efficiency for their entire agent network. Financial Services Cloud has helped unify the company's digital and traditional channels to create a 360° view of their customers, allowing for personalized and contextual interactions through each step of their engagement journey.





 Results. Guaranteed.

CALGARY

WINNIPEG

TORONTO

MINNEAPOLIS

PORTLAND

POZNAN

LONDON

CAPE TOWN