



Case **Study**

Salesforce Migration



CASE STUDY

Salesforce Migration

CUSTOMER NAME:

Not available. This is a real case study, and the customer agreed upon an anonymous case study.

CUSTOMER DETAILS:

Political consulting firm

ORGANISATION TYPE:

Privately Held

EMPLOYEES:

25 - 50 Employees

SUMMARY OF KEY BENEFITS:

- CRM integrated with desired third party apps
- More efficiency with customised sales life-cycle
- No vendor lock-in any more (by moving away from Salesforce)
- In-house CRM knowledge thanks to training delivered by SalesAgility
- Lower costs

Summary of Aims

The company in this case study is a political consulting firm which offer services in the areas of organising, strategy, training and evaluation. The organisation has over 30 members of staff and focuses on organising, engaging and mobilising people.

Most of their new business comes from their strong relationships with clients thus is it vital to have a good working CRM, which adds strategic value, embedded within the organisation.

They were looking to migrate from Salesforce to SuiteCRM to achieve the amount of integration desired with third party applications.

Key items for implementation:

- Contact Management
- Relationship Management
- Client Life-Cycle Management
- Pipeline Forecasting
- Email Campaigns
- A seamless integration with Microsoft Outlook

The Challenge

The client was using an out-of-the-box version of Salesforce however the Sales team did not fully engage with it. Due to the nature of the Salesforce licence they could not achieve the amount of integration desired with third party applications. They desired a CRM which was streamlined and simple to use.

The following data was inside their Salesforce instance:

	# Records		# Records
Accounts	2,011	Tasks	301,686
Contacts	1,139	Opportunities	2,036
Campaigns	98	Documents	2,112
Campaign log	60,551	Users	54
Meetings	3,064		

The Solution

Geeking Out engaged in consultancy activities to determine which sections of the CRM should be hidden to certain users. The standard sales life-cycle was customized to fit their business process to take a proposal request through to a completed project.

The data was extracted from Salesforce to CSV files which were then manipulated using tools and scripts to feed into the CRM.

Due to the distance between Geeking Out and the client all the training was completed remotely. As the Users were comfortable with CRM systems, Geeking Out devised a bespoke training programme to address the areas where the client wanted to focus on, mainly workflow and reporting.

Since deployment the client has also discovered an additional benefit of being able to use the CRM event package to manage their events.

The client is now a CRM user that is in full control over their own data and CRM system, with the third party integrations they need. At the same time they now have features only expensive versions of Salesforce provide (such as workflows) and they can add users without having to pay for each one of them.

About our CRM

Key features include sales, marketing and service modules. Geeking Out is the logical option for enterprises and organizations looking for professional CRM services, such as migrations, consulting or training. For more info, as well as a free demo, check out: www.geekingout.net