

Case Study

TEKsystems Salesforce implementation for a global asset management firm.

PROBLEM

The client was using an outdated lead generation tool that was no longer supported and was one of multiple systems used for managing clients.

SOLUTION

TEKsystems implemented Salesforce Financial Services Cloud to improve customer retention and increase sales results.

RESULTS

- Gained 7% efficiency by reducing call center average handle time (AHT) by roughly 20 seconds
- Reduced TCO on legacy systems saving \$3.4M over two years avoiding costly upgrade by going straight to the cloud
- Increased Lead Conversion rate by 15% and Customer Retention up to 7% on a \$1T AUM portfolio

