

### **Challenge**

1. The in-house CRM system had limited feature, and it was time consuming for report generation
2. There was an issue of security and the version cannot be updated automatically to cope with changes,
3. Huge amount of data of 20-30 GB was costly to handle
4. There would be special requests from headquarters in the dimension of report generation, and existing system was not adaptable enough to cater for the need

### **Project Objective**

1. The standard view of CRM system could save the time in report generation
2. Access right can be granted to different levels and can set limitation in the login time and location. Also version update can ensure the technical issue can be minimized
3. Part of the sizeable data has been moved from on-premise to cloud
4. The user-friendly interface can enable reports with different dimension with drag and drop features of the respective field in Salesforce.

### **Product**

Sale Cloud and NPSP

### **Countries Covered**

HK

### **No. of Business Users**

25 license of Sales Cloud and Nonprofit Success Pack (NPSP)

### **Business Benefits**

1. Time for report generation has been significantly saved from several hours to several minutes
2. Level of security has significantly enhanced.
3. Our Salesforce Cloud solution can effectively reduce the burden of data storage
4. Reporting can better cater to the need of headquarters