



## **Case Study**

### **Small-Cap Financial Services Company**

#### **Problem:**

The client was migrating from ACT! to Salesforce and needed to migrate years' worth of client and prospect data. They also needed a plan and training for their Salesforce users.

#### **Solution:**

CloudQnect's QuickStart service provided the needed services.

1. Implemented a solution to export the required data from ACT! into the client's new Salesforce instance.
2. Walked the client through the capabilities and carefully listened to establish specific business needs
3. Customized their Salesforce instance to meet their processes.
4. Recommended Apps to help them maximize their use of Salesforce.
5. Tested and made adjustments to the client's data and loaded all "clean" data.
6. Provided best practices and responded promptly to questions.

#### **Outcome:**

1. The client was up and running on Salesforce within their budget and their tight timeframe.
2. 30-days post-implementation, the client's users were able to ask questions and request additional customizations based on their first month using Salesforce.