



# Salesforce Development for IT Services Company

## PROJECT DETAILS

 Custom Software Development

 Oct. 2020 - Ongoing

 \$10,000 to \$49,999

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*"They are responsive and friendly as well as knowledgeable about every area of Salesforce."*

## PROJECT SUMMARY

An IT services company is collaborating with SP Tech for Salesforce development. They've transitioned a Salesforce Classic interface into Lightning, leveraging the platform and improving business efficiency.

## PROJECT FEEDBACK

SP Tech's works have helped change the company's operations and scale and create a future sustainable business model. The team holds regular meetings, keeping track of each process and addressing requests and concerns. Overall, the client has highly vouched for their professionalism and consistency.



## The Client

Please describe your company and your position there.

I'm the Director of Client Services & Marketing at Apex Technology Group. We are headquartered in Cranston, RI with offices in Massachusetts and New York.

## The Challenge

For what projects/services did your company hire SP Tech, and what were your goals?

We acquired SP Tech services initially to transition our Salesforce CRM from the Classic interface to the new Lightning interface. Our goals were to improve company efficiency using the available work flow tools and other amenities Salesforce offers, and we needed a partner to help us accomplish these goals.



**Kimberly Donald**  
Client Services & Marketing  
Director, Apex Technology Group



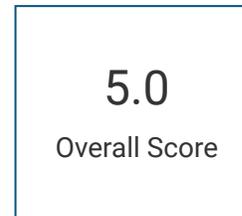
IT Services



11-50 Employees



### CLIENT RATING



Quality: 5.0

Schedule: 5.0

Cost: 5.0

Would Refer: 5.0





## The Approach

### How did you select this vendor and what were the deciding factors?

We found SP Tech through UpWorks online. We reviewed numerous candidates applications for the project. We selected 3 different companies to interview and after our conversations came to select SP Tech for the project. Our decision was made based on the range of skillset SP Tech was able to offer as well as their competitive pricing for a long term project.

### Describe the scope of work in detail, including the project steps, key deliverables, and technologies used.

The SOW for our initial request was to transition our current Classic interface to the new Lightning Interface. We communicated frequently via web meetings and emails throughout this entire process. We felt up-to-date and informed each step of the way. This process included training sessions to ensure our team was set up for success.

Once this project was complete, we entered into an ongoing time and materials contract to accomplish other new request. Monthly Reporting for internal and external send, Community Partner Portals development and custom build, DocuSign integration with a custom solution for our sales team. This included how-to training documents and videos. Daily break/fix request as well as web-to-case form and client satisfaction surveys with reports built to monitor and audit all of these new systems.

### How many people from the vendor's team worked with you, and what were their positions?

There were a range individuals working on our request. The team consisted of a project manager as well as 2-4 different developers actively working on our projects.



## The Outcome

Can you share any measurable outcomes of the project or general feedback about the deliverables?

The work completed by SP Tech has changed the way that our company does business. Their efforts have helped us scale and create a sustainable model for future growth.

Describe their project management style, including communication tools and timeliness.

The project management style has been great. They used checklist software to keep track of the stage of the request and held frequent meetings to review outstanding task live and complete during screen-share sessions to ensure all questions have been answered and the request was completed to our satisfaction.

What did you find most impressive or unique about this company?

We have been impressed with the teams professionalism and consistency. We have also been impressed with their ability to solve any problem. They are responsive and friendly as well as knowledgeable about every area of Salesforce. There has not been one request we have made that the SP Tech team could not figure out how to accomplish. Even when Salesforce was limited, they came up with a custom solution to meet the need. This team has been highly valuable to us and we would highly recommend their services.

Are there any areas for improvement or something they could have done differently?

At this time, I have not been dissatisfied with their work in any way.