S-Docs Switch to Lightning
Upgrading Salesforce for Growth

The Architech Club

salesforce **PARTNER**

Company Overview

S-Docs is an innovative Salesforce AppExchange partner, enabling Salesforce customers around the world to create, automate and e-sign documents quickly and securely using their native tool since 2010. S-Docs was facing a critical business challenge as they went through a period of growth: their Salesforce solution didn't meet their maturing needs, there were too many system administrators and they didn't have the skills in-house to manage the move to Lightning Enterprise edition without causing major disruption to their business.

Company Profile

LOCATION	New York, USA
EMPLOYEES	24
INDUSTRY	High Tech
SOLUTIONS	Sales, Service, AppExchange
PROJECT DATE	October 2020

Challenge

- 10 year old Salesforce solution - lack of access to the powerful tools and workflows that Salesforce now offers
- Limited the scope and visibility of their valuable data - incompatible with growth
- Risk to data security: No. of Admins; no visibility of changes; confusion over responsibilities
- Undocumented processes making it difficult for them to know what features their solution needed to include

Solution

- Guided S-Docs through a Lighting migration
- Designing the data architecture
- Transferring data from their old, outdated system to Lightning quickly and smoothly
- Structured change management - using native collaboration tools to make change transparent and encourage feedback
- Designed user training according to the user roles for the solution

Results

- Improved system governance and security with fewer system Administrators
- Increased system stability with documented change process
- Project complete and all users trained in Salesforce Lightning solution within 1 month