

Customer Story: Legg Mason

Industry

Asset Management

Solutions

Custom Cloud – EE2, Chatter

Staff

10,000+ Employees

HQ Office

Baltimore, MD

Legg Mason is an affiliate investment group, based in Baltimore, Maryland but with individuals throughout the world. Legg Mason specialties include equity, fixed income, liquidity, and alternative investments.



Salesforce Challenges

- ⦿ Team did not have automation or integration with Adobe sites
- ⦿ Partner management was done in a third-party system
- ⦿ Existing sales systems did not integrate with customer master data systems
- ⦿ Partner commissions were not reportable on SFDC
- ⦿ Problems integrating with Legacy financial systems
- ⦿ No process automation
- ⦿ No standard sales system/process across
- ⦿ Reporting was time consuming
- ⦿ Processes were complex and manual

Access Global Group Solutions

- ⦿ Set up Chatter & Files for internal communication & file storage
- ⦿ Built custom integrations with Adobe Sites to sync data into Salesforce
- ⦿ Integrated Salesforce with 9 different systems
- ⦿ Built partner processes with automated workflows & approval processes
- ⦿ Created a structure for users to work remotely in peak seasons or disaster recovery
- ⦿ Created and implemented Reports & Dashboards
- ⦿ Designed custom webservices
- ⦿ Custom development
- ⦿ Designed custom pages
- ⦿ Configured system to optimize performance

Salesforce Results

- ⦿ Partner signup process is now streamlined, removing friction from the process
- ⦿ Partner validation process is streamlined
- ⦿ All partners are now managed on Salesforce where opportunities can be spotted early
- ⦿ Chatter used company-wide for internal collaboration & sharing files
- ⦿ Data from Adobe sites can now be accessed real-time on Salesforce
- ⦿ New partnership process and pipeline now enable the executive team to visualize company direction and opportunities
- ⦿ Real-time integration with third-party systems
- ⦿ Reporting and commissions are now real-time
- ⦿ Significant time savings is creating greater productivity and opportunities