

WIDELY ADOPTED, UNDER-BUDGET SALESFORCE PROGRAM DELIVERY

Our client is a multinational medical device and healthcare company with more than 100,000 employees and \$43+ billion in annual revenue. With a global presence and a strategic emphasis on growth through acquisition, our client regularly needs to integrate legacy systems and processes for employees worldwide.

THE CHALLENGE

A large, global division of the company needed to integrate its many sales platforms into one centralized Salesforce solution. As a result of recent acquisitions, the division's sales teams were using numerous legacy tools; the organization lacked unified data, consistent processes, and actionable reporting. Company leaders knew the division needed to sunset legacy systems and implement one instance of Salesforce globally.

This client secured a \$6 million budget to deploy a new, centralized Salesforce Lightning instance division wide. Division leadership established a program timeline consisting of 21 total deployments and engaged a Big Four system integrator to lead the effort. During the first half of the program, the system integrator engaged about 40 billing consultants to augment the client team. Of these, 20 consultants were dedicated to data migration. The first deployment – for users in the United States – was bumpy. Most notably, data migration from legacy systems was not resulting in 100% accurate data, so users were frustrated. More than half the program budget had been depleted with more than half of the remaining international deployments left to go, and the scope and timeline were in jeopardy.

Our client's challenge was now twofold: the original problem of several separate sales platforms still needed to be resolved, *and* the resources allocated to solving it were being used up much too quickly. At the current rate of progress, the program would run out of money before meeting its deployment goals. The senior director leading this program at the client envisioned a better way forward – and he knew it required a consulting partner willing to get creative with him.

THE SOLUTION

This client manager engaged a project manager from Turnberry's **Delivery as a Service** group to help build a new program structure for the implementation. Together, this Turnberry consultant and the client manager began to sketch out a proof of concept for two small scrum teams to replace the 40+ Big Four consultants currently on board.

In the meantime, a **Crew** associate named Matt had just finished his first client assignment. Crew, Turnberry's consultant development program, identifies and trains future leaders who have up to five years of career experience. Matt had earned his bachelor's degree two years earlier and became interested in Salesforce during his first few months as a consultant. He participated in Turnberry's inaugural **Crew Salesforce Academy**, an immersive Turnberry training program that prepares consultants to pass the Salesforce certification exam. Matt earned his Salesforce Admin 201 certification shortly after.

Turnberry Solutions Case Study: Delivery as a Service, Medical Device Client

Back at the client, our Turnberry project manager and the client program manager had developed a new program team. They designed two Scrum teams to complete the implementation; the teams each had a Product Owner, and they would share one Scrum Master, one developer, and one data migration specialist between them. They also designed a two-person operations team to continue to run the platform after deployment. The new structure called for eight people total – a mixture of client employees and Turnberry consultants – to replace more than 40 Big Four consultants.

A virtual transformation. The new eight-person client-Turnberry team took over the program in early 2020. This meant that in addition to delivering the new Salesforce solution, the team had to adapt to a fully remote work environment. Because **adaptability** is one of Turnberry's core values – and Turnberry consultants are used to pivoting quickly to meet changing client needs – the team turned this challenge into an advantage. Navigating the challenges of virtual engagement, differing time zones, and multiple languages, the team replaced expensive, two-week on-site discovery workshops with a new virtual **discovery, refinement, readout, and build** process.

Integrated capabilities and hybrid delivery. This team committed to an Agile process for the software build, alongside a master project plan for any program activity not governed by the design and build sprints: integrations, quality assurance, training, and communications. Turnberry project managers are comfortable across methodologies and within a wide variety of client services areas; the members of this lean program team effortlessly leveraged Turnberry's **project management, organizational change management, and Salesforce** capabilities for a successful Agile delivery.

The Crew advantage. One of the program's biggest – and most expensive – challenges was accuracy in data migration. During the first phase of the program, 20 consultants were working on data migration activities at a given time. Despite frequent meetings, regular communication, and significant resources allocated to data migration, the client saw about 95% data accuracy after migration during initial deployments. This left end users frustrated and eroded their confidence in the new tool.

The program called on Matt, the Crew associate with one year of career experience and a newly earned Salesforce certification to take over the effort. With a desire to learn and a healthy dose of Turnberry's core value of **positivity**, this associate developed a new method to identify and correct the 5% of data that was being bungled. This formula led to 100% accuracy in data conversion for the remaining deployments and is adaptable to future data migration needs at the client as well. The system integrator quoted \$1 million for what this team completed with \$200,000.

KEY RESULTS

- The program came in more than \$1 million under the allocated \$6 million budget, with a program team 20% of the size of the original Big Four team
- All eight of the project deployments executed under the new Turnberry-client teams went live on time, with the original deployment scope intact
- At the close of hypercare, 100% of the 20,000 system users had logged into the new tool, and there were **zero** outstanding open issues
- This innovative model of program delivery is repeatable and adaptable to other divisions, projects, and programs – which provides the client with a template for future successes
- The program was honored with a **President's award**, one of the company's top accolades



**Crest
Partner**