

MILLER KAPLAN MAXIMIZES SALES CLOUD EFFICIENCY WITH COMPLEX DATA MIGRATION

Miller Kaplan implemented Salesforce Sales Cloud, replacing a failing legacy platform riddled with issues. KMS performed complex data migration and implementation for 100+ users, after another partner failed to produce high-quality results.



Miller Kaplan is a top U.S. accounting firm that was founded in 1941. Located in Los Angeles, Miller Kaplan provides audit, accounting, business management, and information security services, among others, to high-net-worth individuals, startups, and Fortune 500 companies. With more than 250 trusted advisors, Miller Kaplan provides their clients with the technical and industry expertise that will help their clients succeed.

35%

increase in user productivity

25%

increase in sales/revenue

~20%

improvement on data integrity

~25%

increase in revenue forecasting accuracy

Challenges:

- Miller Kaplan needed a partner that would rescue their implementation project by providing insight for their digital transformation and drive decision making.
- The legacy platform was failing and data integrity was very poor.
- The implementation had to work for several business lines and be rolled out in between tax seasons so that training and adoption could be successful.
- Miller Kaplan also needed to integrate Salesforce with a new ERP system that needed to be rolled out in between tax seasons.



Partnering with KMS to implement our Salesforce has been an absolute game-changer. Their white glove service was truly exceptional. They took the time to understand our needs, walked us through every step of the process, and delivered results beyond our expectations.

— Rebecka Valente,
Director of Brand & Business Development

KMS Impacts:



By providing the appropriate team for implementation, KMS was able to quickly assess the state of the project and successfully to turn around results within 6-Weeks.



KMS quickly analyzed the legacy system, along with current & desired business processes across multiple business lines and provided a roadmap & plan for data migration within the first week of the engagement.



While KMS implemented Salesforce at lightning speed, we also worked closely with Miller Kaplan to understand the ERP and support the necessary integrations to successfully go-live with both systems.



KMS provided white glove services to deliver Salesforce functionality rapidly, migrate the data and improve data integrity, and provide user training while rolling out the Salesforce Sales Cloud for all users.

salesforce Clouds:



Sales



Other Technologies Used:

