

Optimizing with Lightning

Midwestern Credit Union



Challenge

A midwestern credit union launched a key initiative to upgrade the member experience by investing in best-in-class technology.

- The client decided to migrate to Salesforce Lightning to boost productivity and provide an enhanced member experience.
- The current implementation of Sales Cloud and Service Cloud was highly customized, including more than 50 Visualforce pages.

The credit union started the migration, but facing resource constraints and limited expertise, the client needed the assistance of a partner to meet an aggressive timeline.



Solution

TEKsystems Global Services consulted with the client and the stakeholders in IT to fully understand the current state and develop a roadmap to the future.

To meet the business requirements, our team:

- Addressed the technical debt prior to beginning the migration.
- Analyzed the Visualforce pages and determined the best approach to migrate them to Lightning, while optimizing the user experience.
- Leveraged continuous quality practices to ensure the implementation met the needs of agents and members.

We provided a full team to meet the deadline and held regular workshops with the credit union's committee to ensure alignment.

Results

TEKsystems Global Services collaborated with the credit union to finish the entire project within the six-week schedule. Our team:

- Applied deep experience and best practices to complete the migration.
- Migrated more than 550 end users to the new experience.
- Redesigned and converted over 50 Visualforce pages, which improved usability.

We continued to support the new experience for an additional six months to ensure a smooth transition.

With the Salesforce Lightning implementation, **the credit union grew by over 57%.**