

# CRM Implementation

## Wealth Management Firm

### Challenge

A leading financial services organization sought to implement a Customer Relationship Management (CRM) solution for its global public relations team. The goal was to streamline day-to-day activities, provide greater transparency, and enable easy access to media requests and engagement information. The organization needed a central repository to manage media content and improve efficiency in handling media engagements.

### Solution

Over a 14-week project, TEKsystems Global Services partnered with the team to deploy Salesforce Sales Cloud using standard out-of-the-box features:

- Built multiple stages of the media engagement process with workflows and process builder.
- Implemented notifications and alerts to keep stakeholders informed.
- Developed reports and dashboards for enhanced visibility.
- Enabled Single Sign-On (SSO) for seamless access.

### Results

- **Unified CRM Platform:** Delivered a single, integrated system for managing all media engagements, eliminating silos and manual processes
- **Streamlined Workflows:** Automated key stages of the media engagement process, reducing administrative overhead and accelerating request handling.
- **Measurable Metrics:** Enabled the organization to set and track KPIs for media engagement, supporting data-driven decision-making and continuous improvement.

## Enhanced visibility through robust dashboards and reports,

providing real-time insights into engagement status, team performance, and request turnaround times.