

Advance with Lightning

Midwestern Credit Union

Challenge

Upgrading the member experience and enhancing productivity were key targets for a midwestern credit union.

As part of a modernization initiative, the customer decided to migrate to Salesforce Lightning, but the current implementation of Sales Cloud and Service Cloud was highly customized.

With limited inhouse expertise, the credit union needed a partner to lead the project and meet an aggressive timeline.

Solution

TEKsystems Global Services analyzed the current state and defined a roadmap to achieve the business requirements.

- Addressed the technical debt prior to beginning the migration.
- Evaluated 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.
- Facilitated regular workshops with stakeholders to maintain alignment.

Results

We collaborated with the customer throughout the engagement and finished the entire project within the six-week schedule.

- 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.
- Continued to provide support for an additional six months to ensure a smooth transition.

57% growth

achieved through the credit union's implementation of Salesforce Lightning