

Innovate with Salesforce

Global Investment Management Firm

Challenge

With a rapidly expanding business-to-consumer line of business, an investment management firm needed to implement a robust customer relationship management (CRM) system.

- The firm was using multiple in-house legacy systems that failed to meet the needs of the sales, service, and management teams.
- Our stakeholders wanted to improve sales and service capabilities, enable scalability as the organization grows, and drive organic growth via sales.

The firm also sought to support the core strategy of dedicated relationship management among high-value clients by providing a platform to manage and deepen their client relationships.

Solution

TEKsystems Global Services (TGS) collaborated with the firm to fully analyze the requirements and advise on a solution. We migrated all pertinent sales information from legacy applications into Salesforce FSC, as well as architected and integrated a large data volume (LDV) of over 20 million records into Salesforce, including customer, financial, and interactions data. TGS also developed an approach to provide real-time visibility to key metrics. Custom features included:

- Auto-generation of guided sales tasks.
- Unified view of customer information, including interactions, transactions, household members, and relationships.

Results

TEKsystems Global Services leveraged our focused agile approach to deliver business value bi-weekly, and we developed a sophisticated solution. Within the first week of go-live, the firm measured the following metrics:

- 86% user adoption within one week, based on the number of user logins.
- 11,434 customer interactions logged, including tasks, events, and emails
- 1,047 new leads created

The firm continues to show strong results with business-originated data in Salesforce, and the associates appreciate the transparency of information.

2,270 net new

opportunities added.

\$255M increase

to the sales pipeline.