

# Case Study: Financial Cloud Migration



Dallas, Texas



B2C, Consultant-Driven Sales



## Phase 2– Rollout

- Adopted Onsite/Offshore Model for cost and time efficiency.
- Developed initial framework for Mobile App.
- Migrated Classic Code Base into Lightning Experience.

## Impact

- User Productivity improved due to faster information flows through the CRM platform.
- Increased Collaboration between Sales and IT teams.
- Better Customer Engagement on the App.

## Phase 3 – Optimize

- Continuous Gap Analysis during R&D to better inform Feature Development.
- Increase Client Collaboration to avoid Technical Debt and further drive efficiency.

## The Problem

- Org Setup on Classic Experience w/ generic page layouts.
- Direct impact on Sales Pipeline due to slow delivery of leads and analytics.

## Phase 1 – Discover

- Low User Productivity due to slow data streams caused by repetitive calls.
- Low Customer Engagement due to lack of Mobile App.

