

A decorative graphic consisting of a network of interconnected nodes and lines, rendered in shades of blue and orange, spanning across the middle of the page.

CASE STUDY
INTEGRATING AN INTERNAL CRM **WITH SALESFORCE**

CLIENT OVERVIEW:

This company provides digital transformation solutions to their clients such as cloud, IT services and security.

CLIENT PROFILE:



LOCATION:
Grand Rapids, MI



EMPLOYEES:
200



INDUSTRY:
IT Technology
and Services



SOLUTIONS:
Salesforce Sales Cloud

CASE STUDY: INTEGRATING AN INTERNAL CRM WITH SALESFORCE

CHALLENGE:

The client has been using various custom CRM applications throughout its lifetime. These systems were difficult to maintain and to gain visibility into the organization as a whole. Each application was helpful to one specific team, but it was cumbersome to get visibility to the rest of the company.

The organization decided to adopt Salesforce and implement for the Sales organization as an initial rollout. In order to minimize impact to the company's operations, they decided to keep the Enterprise Resource Planning portions of the systems in their custom application and integrate those applications with Salesforce to gain visibility into the lifecycle for their clients.

The goals of the initial phase were to provide greater visibility to the organization while not disrupting operations. The second goal was to build Salesforce in a way that it could be extended in later phases to replace the other systems around the entire customer lifecycle.



SOLUTION:

- ◇ Implemented Salesforce Sales Cloud, integrating the company's accounts and contacts
- ◇ Analyzed all other systems in the customer lifecycle process to determine data visibility needs
- ◇ Implemented Dell Boomi integration platform to manage two way communication between Salesforce and custom ERP systems
- ◇ Built integrations to provide 360 visibility of their customer for Sales, Marketing, Operations, and Support

RESULTS:

- ◇ Successfully integrated custom applications with Salesforce Sales Cloud
- ◇ Replaced and automated many Sales processes through implementation of Salesforce
- ◇ Provided greater visibility to the entire organization through Salesforce to help build a better customer experience