

## Case Study

# Salesforce Implementation

[www.tekbank.net](http://www.tekbank.net)

### Background

A Maryland-based retail organization had been trying unsuccessfully for 18 months to integrate and implement Salesforce within its organization. **TekBank** was referred to the client by another service provider, and was contracted to:

- ⚙️ **Assess the current status of the Salesforce configuration and implementation**
- ⚙️ **Assess the performance of the existing Salesforce implementation team**
- ⚙️ **Propose a set of schedules and actions to fully implement Salesforce within the client and IT environments**
- ⚙️ **Manage and control the setup, configuration, data conversions, staff training, and implementation**

### Approach

Over a 5-month period, **TekBank** brought forward a senior Salesforce architect with strong Project Management and Organizational Change Management (OCM) skills and an experienced Salesforce administrator. During that period, **TekBank's** personnel and support team worked closely with the client's personnel and key stakeholders to 1) Provide the client community with a crash course on Salesforce capabilities. 2) Build a set of detailed work flows that would pertain directly to the client's operating environment and how Salesforce would be used to integrate into that environment. 3) Map the client's existing data to the Salesforce schemas. 4) Work with the client's IT department to ensure that the data was properly converted. 5) Develop a set of training material for key stakeholders, and provide initial training. 6) Work with client's IT team to properly configure Salesforce within the operational environment. 7) Provide as-needed support during cutover to Production.

### Results

The entire process was well thought out, properly managed, and well-executed. Issues were documented and reviewed several times a week, and were resolved in a collaborative fashion. The client and **TekBank** teams worked well together, which resulted in a successful rollout. The client remains satisfied with Salesforce and manages and operates the environment without the need for ongoing consulting support.