

Case Study – Financial Services

Ciberspring Salesforce.com Practice



Case Study
Financial Services

THE CLIENT

- ❑ A fortune 500 founded financial services company (insurance).

THE CHALLENGE

- ❑ Client had recently gone through multiple acquisitions and desired to have a consolidated CRM platform for all of its sisters companies in order to collaborate across sales teams and processes.
- ❑ Due to disparate data sources and formats, data hierarchy was being manually managed and maintained.

THE SOLUTIONS

- ❑ Client engaged with Ciberspring to initiate an assessment which resulted in recommendation for a phased-based implementation approach. Phase I included sales team members and processes, and also included a custom data hierarchy component that provided (for the first time) an accurate view for management. Phase II focused on the marketing team processes as well as integration with the client data warehouse. Phase III is currently being worked on for scope.

THE RESULTS

- ❑ Client has successfully deployed Salesforce across the sales and marketing teams and seen a steady increase in revenue based on managing the sales processes through the platform. They are able to forecast better, follow up on renewals on a timely manner, find out sales hierarchy relationships immediately, focus on “hot” opportunities, and report efficiently on the impact that activities have on an actual sales.