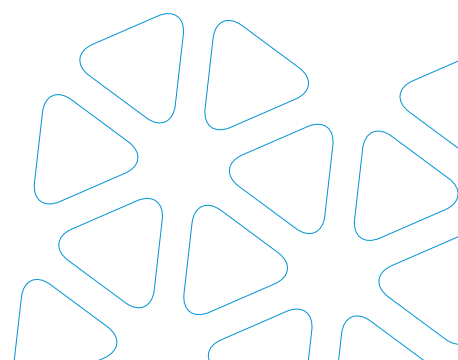




# A Unified View

A STORY OF OWNING CHANGE



## Harnessing the power of Salesforce Financial Services Cloud

A global leader in the investment industry, our client empowers people and businesses to achieve their financial goals. With a presence in 47 countries and over \$1 trillion in assets under management, they take their clients beyond numbers with strategic investing.

### THE PROPOSITION:

Eager to evolve

Our client wanted to upgrade their customer relationship management (CRM) tracking system. The goal? Integrating multiple in-house systems into a single, cloud-based platform for a more holistic view of all sales and services activities. They envisioned their sales team better equipped with critical intel for improved service, delivery, lead capture and, ultimately, selling.

### OUR PROPOSAL:

One for all

Goodbye, legacy systems. Hello, Salesforce Financial Services Cloud (FSC). Partnering with our client, we designed and built a modern, shared platform to unite their sales, services and management teams. Generating a 360-degree view of their clients.

Migrating over 20 million customer, financial and interaction data records into Salesforce, users now have access to critical information they need—when and where they need it. Enhanced transparency and traceability powering productivity, customer satisfaction and revenue growth.

### POWERFUL PARTNERSHIP:

A huge jolt of ROI

The path to success isn't always straight and narrow. That's why flexible partnership is the active ingredient. Leveraging our practice capabilities and offshore delivery centers, we scaled to achieve our client's vision. When priorities changed, we changed with them. We created technical roadmaps, thoughtfully crafted to minimize their initial investment and reduce the total cost of ownership.

Because FSC is designed for the Salesforce Lightning Experience, we optimized a Lightning-first implementation. Our client could immediately take full advantage of the platform's latest features and functionality, minimizing the costs incurred from technical debt. With reduced maintenance costs and continuous product innovation, real ROI was generated.



## Real-World Results

Transformation, achieved. Our client went from juggling disparate applications to one unified platform. Now with the ability to see everything about a single customer in one interface, it was time to get to work. Within two weeks of upgrading, internal user adoption reached 86%. Within a year, over 11,400 customer interactions were logged and over 2,200 net new opportunities were added—yielding a potential for \$255 million into their sales pipeline.

Critical intel, delivered. Customer satisfaction, improved. Internal user adoption, through the roof.

With us by their side, our client plans to continuously optimize and evolve their next generation of wealth management products via Salesforce. They envision new iterations every year shaping technical and business solutions. Powerful results that power performance.

**\$255M**

in sales pipeline

**11,400+**

customer interactions  
logged

**2,200+**

net new  
opportunities added

### About TEKsystems

We're TEKsystems. We accelerate business transformation for our customers. We bring real-world expertise to solve complex technology, business and talent challenges—across the globe. We're a team of 80,000 strong, working with over 6,000 customers, including 80% of the Fortune 500 across North America, Europe and Asia, who partner with us for our scale, full-stack capabilities and speed. We're strategic thinkers, hands-on collaborators, helping customers capitalize on change. We're building tomorrow by delivering business outcomes and driving positive impacts in our global communities. TEKsystems is an Allegis Group company.

Learn more at [TEKsystems.com](https://www.teksystems.com)