

Salesforce to SuiteCRM Migration



Summary of Aims

The company in this case study is a political consulting firm which offer services in the areas of organising, strategy, training and evaluation. The organisation has over 30 members of staff and focusses on organising, engaging and mobilising people.

Most of their new business comes from their strong relationships with clients thus is it vital to have a good working CRM, which adds strategic value, embedded within the organisation.

They were looking to migrate from Salesforce to SuiteCRM to achieve the amount of integration desired with third party applications.

Key items for implementation:

- Contact Management
- Relationship Management
- Client Life-Cycle Management
- Pipeline Forecasting
- Email Campaigns
- A seamless integration with Microsoft Outlook

The Challenge

The client was using an out-of-the-box version of Salesforce however the Sales team did not fully engage with it. Due to the nature of the Salesforce licence they could not achieve the amount of integration desired with third party applications. They desired a CRM which was streamlined and simple to use.

The following data was inside their Salesforce instance:

	# Records		# Records
Accounts	2011	Tasks	301686
Contacts	1139	Opportunities	2036
Campaigns	98	Documents	2112
Campaign log	60551	Users	54
Meetings	3064		

CUSTOMER NAME:

Not available. This is a real case study, and the customer agreed upon an anonymous case study.

CUSTOMER DETAILS:

Political consulting firm

ORGANISATION TYPE:

Privately Held

EMPLOYEES:

25 - 50 Employees

SUMMARY OF KEY BENEFITS:

- CRM integrated with desired third party apps
- More efficiency with customised sales life-cycle
- No vendor lock-in any more (by moving away from Salesforce)
- In-house CRM knowledge thanks to training delivered by SalesAgility
- Lower costs

The Solution

SalesAgility engaged in consultancy activities to determine which sections of the CRM should be hidden to certain users. The standard sales life-cycle was customised to fit their business process to take a proposal request through to a completed project.

The data was extracted from Salesforce to CSV files which were then manipulated using tools and scripts to feed into SuiteCRM.

Due to the distance between SalesAgility and the client all the training was completed remotely. As the Users were comfortable with CRM systems, SalesAgility devised a bespoke training programme to address the areas where the client wanted to focus on, mainly workflow and reporting.

Since deployment the client has also discovered an additional benefit of being able to use the SuiteCRM event package to manage their events.

The client is now a SuiteCRM user that is in full control over their own data and CRM system, with the third party integrations they need. At the same time they now have features only expensive versions of Salesforce provide (such as workflows) and they can add users without having to pay for each one of them.



About SuiteCRM

SuiteCRM is the world's most popular open source CRM with over 800.000 downloads and an estimated 4 million users world wide. Main features include sales, marketing and service modules. SalesAgility is the driving force behind SuiteCRM and the logical option for enterprises and organisations looking for professional SuiteCRM services, such as migrations, consulting or training. SalesAgility offer with SuiteASSURED a total care package for SuiteCRM.

For more info, as well as a free demo, check out: www.suitecrm.com