

# In Plain Sight

## CRM migration activates predictable KPI management



Communications



Digital Transformation



Salesforce

### BACKSTORY

Rapidly expanding through acquisitions, a major Canadian telecom service provider looked to bolster its CRM with enhanced capabilities. Supported by three different vendors, the telecom company lacked visibility, continuity, and accountability across its CRM objectives. As its portfolio and Salesforce dependencies grew, our client sought a partner to integrate its acquired legacy platforms and migrate to a more functional and customizable Salesforce operating system.

### SOLUTION

TSG created specific customized workflows, providing the client predictability and accountability for its teams through tracking metrics and KPIs. Our Managed Solutions team partnered with the client to personalize workflows and employee experience by delivering and integrating applications. TSG integrated the CRM system to the upgraded platform seamlessly, minimizing the learning curve while providing full life cycle and services support for multiple workflows including event monitoring, DevOps, and tier 3 support.

## TSG MANAGED SOLUTIONS

### Solution Development

Providing KPI and tracking recommendations, our solutions architects partnered to create a solution responsive to the client's vision, requirements, and timeline.

### Building & Scaling Teams

With a solution laid out, TSG allowed the client to offload responsibilities. TSG rapidly built a team of skilled developers, supporting them in gaining additional Salesforce certifications.

### Service Delivery

Leveraging Agile KPIs, TSG's engagement management team led project teams, tracked performance, and reported on deliverables, delivering a solution that ensured service level agreements and milestones were met.

## Project Outcomes

Our client designated TSG's agile tools for accountability and workflow predictability as best practices, and adopted them in additional internal teams throughout the organization.

Over 60 legacy platforms were integrated into the new CRM, providing our client full life cycle support and minimizing the employee learning curve.

With the rollout of an upgraded CRM, the client seamlessly implemented advanced functionality to support its employees.