

Legacy to Modern CRM Transformation

AIM Consulting Provides Expertise to National Manufacturing Organization Migrating from Salesforce Classic to Lightning

OVERVIEW

A national manufacturer was looking for a more user-centric CRM platform that offered a mobile-first approach, responsive user experience, drag and drop features, with both desktop and mobile capabilities. AIM Consulting was brought in to support capacity and expertise in driving modernization of their salesforce platform.

CHALLENGE

Process & Documentation:

The path to modernization involved a migration from Salesforce Classic to Lightning. Although Salesforce Lightning has an excellent user interface with more flexibility, the challenge for the organization was around the process and documentation to migrate from Salesforce Classic to Salesforce Lightning. Lacking documentation or records, specifically on the code and why functionalities were implemented,

daily business information was lost as employees transitioned between different teams. In addition to process and documentation, the codebase needed a significant amount of refactoring to support the migration.

SOLUTION

AIM Consulting was selected to provide the organization with both technical and business process support during the new software update. AIM Consulting's expertise around Salesforce Lightning web components and usability pages, along with the ability to re-develop pages created in Salesforce Classic or Visualforce, was a critical factor in the selection.

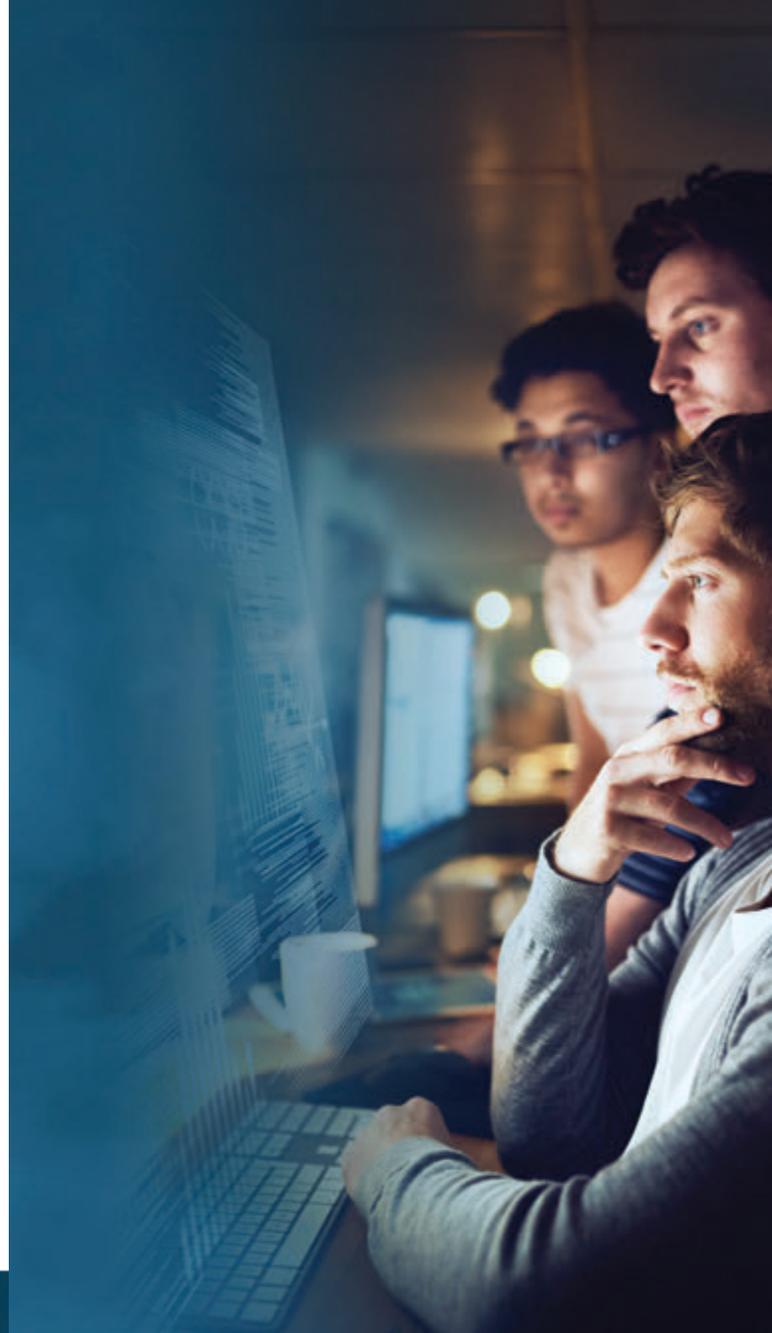


The team performed a delivery assessment to help establish an initial baseline and strategic roadmap to drive towards an agile project management approach. A technical audit by the team uncovered multiple modifications and customizations embedded in other customizations.

Armed with a refined roadmap and technical strategy, the team focused on documentation for the current state Salesforce Classic components and knowledge gained from key stakeholders to create a more suitable business-focused process in Salesforce Lightning. Having achieved consensus on the strategy and architecture approach, the team helped drive a technology solution that exceeded the original stakeholder objectives.

RESULTS

With AIM Consulting spearheading the Salesforce Lightning migration, the business was able to increase efficiencies in the sales cycle and back-office processes. AIM provided a better user experience and less time required for information input, which led to higher adoption of the Salesforce tool across multiple departments.



ABOUT AIM CONSULTING

AIM Consulting, an Addison Group company, is an award-winning industry leader in technology consulting and solutions delivery. AIM's differentiation is our collaborative engagement model that provides cross-functional results. We work with clients, shoulder to shoulder, for one goal – their success. Founded in 2006, with offices in Seattle, Minneapolis, Denver, Houston, and Chicago, we are ranked among the fastest-growing private companies and best companies to work for due to a long track record of success with our partners and consultants. Our long-term relationships with the best technology consulting talent allow us to deliver on expectations, execute on roadmaps and drive modern technology initiatives.

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