

Customer Success Story

CUSTOMER SIZE:

1000 - 5000

INDUSTRY VERTICAL:

Banking Services

SALESFORCE PRODUCTS:

NPSP 3.0

INTEGRATIONS:

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ENGAGEMENT LENGTH:

2 Months

Unlocking CRM Value: From Gaps to Growth at First Tech



First Tech exist to serve our members, not to make a profit. Instead, we put our time, money, passion, experience, smarts, elbow grease and whatever else we can muster up to work for our members, employees and communities. It’s our secret weapon that turns promises into action: investment in you.

Original Challenge

The client’s Member Resource Management app on Force.com had low sales team adoption, poor opportunity attribution, and a fragmented architecture. Tasked with auditing the system, identifying gaps, and proposing a recovery plan. The client aimed to rebuild their CRM to support a unified Member 360 view, integrate financial systems, and streamline sales, segmentation, and self-service processes.

Outcome #1

Identified key process and technology gaps in the client’s existing Salesforce implementation. We delivered detailed architecture and design artifacts including Application Architecture, Data Architecture, and Integration Architecture to support the remediation effort. In addition, we provided technology management services to guide the FTFCU Salesforce development team during implementation.

Outcome #2

We provided ongoing technology management services to the FTFCU Salesforce development team, offering guidance and oversight to ensure successful execution of the redesigned solution.