

**CS**

## **CASE STUDY:** **TRANSFORMATION AND UPGRADE PROGRAM FOR LEADING IPWMS PROVIDER**

### **BACKGROUND**

Our client, a world-leading provider for an open platform IP video management system, implemented Salesforce many years ago. Over the years, new layers of functionalities were added by different providers. At some point, our client became aware that the direction they were following had to change and the set of tools used had to be modernized to support the agile business processes. That new approach required a new strategy on how to upgrade all the crucial business functionalities to the latest and greatest (Lightning) and declutter the whole application from unused elements and data.

### **PROBLEM**

- Legacy parts of a solution not supported any more
- Data storage close to the limit, low quality of data, low performance and quality of reporting
- Need to adjust all the processes to upcoming GDPR regulation
- No internal skills to plan, design and deliver required changes
- Limited budget, not allowing to secure all the areas at the same time



Service  
Manager



2 Salesforce  
Developers



1 Solution  
Architect

## SOLUTION

There were multiple crucial and urgent challenges that needed to be confronted as soon as possible, e.g. GDPR and large data set close to the environment limit. The limitation we were facing was a limited budget. We decided to go for a flexible model where we switched a Salesforce specialist and a Business Analyst according to most important needs. This way, the client had an opportunity to secure its business continuity and resolve most of the hot topics. We helped our client to implement a strict data retention and management policy compliant with the best standards and reduced storage cost by reducing data set size. As a part of the project, we performed a step by step Classic to Lightning migration based on the roles that used Salesforce most often. Currently, we work closely with the client to build a roadmap for future improvements and still maintain the flexible cooperation model.

## OUTCOME

- Application transformation program to comply with the best standards
- Securing business continuity and future improvements
- A Classic to Lightning migration project – high user adoption and satisfaction
- Flexible and affordable cooperation model, where the client decides what skills are required at a time and for how long
- Better application and reporting performance
- Users empowered with a new vibrant Lightning interface and improved existent functionality

