

## Transformation and extension program based on Salesforce for the leading IPWMS provider

### BACKGROUND

Our Client, a world-leading provider for an open platform IP video management system, performed an implementation of 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 that the set of tools used had to be modernized to support agile business processes. This new approach required a new strategy regarding the upgrade of all crucial business functionalities to the latest and greatest (Lightning) and decluttering the whole application from unused elements and data.

### PROBLEM

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

### SOLUTION

There were multiple crucial and urgent challenges that needed to be confronted as soon as possible, e.g., GDPR and a large data set close to the environment limit. Our limitation was a restricted budget. We decided to go for a flexible model where we switched a Salesforce specialist and a Business Analyst according to the most important needs. This way, the Client had an opportunity to secure its business continuity and resolve most hot topics. We helped our Client to implement a strict data retention and management policy compliant with the best standards and reduced the storage cost by reducing the dataset 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 are working closely with the Client to build a roadmap for future improvements and are still maintaining the flexible cooperation model.



**1 Service  
Manager**



**2 Salesforce  
Developers**



**1 Solution  
Architect**

### 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 the time and for how long
- Better application and reporting performance
- Users empowered with a new vibrant Lightning interface and improved existent functionality