



# Preparing for a Cloud Journey

Technology and process readiness for CRM implementation

## Challenge:

A large independent bank chose to implement Salesforce Dot Com (SFDC) as the CRM platform for their bankers. The Client's IT department did not know what the SFDC adoption implications would be within the larger ecosystem of applications and data integration. Due to the lack of Cloud adoption previously, the bank needed a readiness assessment for SFDC and an architectural impact.

## Solution:

WorldLink's comprehensive solution included the following steps to ensure success:

- Assisted in the development of SFDC readiness assessment and micro architecture
- Worked with the Sales and IT departments to identify the SFDC adoption roadmap and use cases by module
- Identified the impacts to remaining applications and especially the impact to the enterprise-wide data warehouse (EDW)
- Produced the impact/assessment document for SFDC adoption and a micro architecture for the bank in 4 weeks.

WorldLink educated the Client to understand the impact of SFDC adoption to its processes and EDW.

## Client Outcome:

WorldLink's deliverables enabled the bank to understand the impact to the adoption process and technology when adopting SFDC. This encouraged the Client to come up with an extended SFDC adoption roadmap by module/solution. The micro architecture helped the Client understand the primary tenant for selection a Systems Integration (SI) vendor.

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