

The logo for 'think' features a blue triangle pointing to the right, followed by the word 'think' in a black, lowercase, serif font.

think

MODERNIZATION

MIGRATION TO SALESFORCE SALES CLOUD

CASE STUDY

This case study involves a well-respected, national organization that provides continuing education to attorneys. With \$67 million in annual revenue derived from the sale of legal programs, publications, and memberships, the organization had developed a significant amount of legacy data. Much of this data was in an on-premises Oracle implementation that had many integration points with other systems.

Problem

- Unable to take advantage of industry innovations in marketing
- Large database of members and many ways to pull lists out of it for mailings but little use of customer data

Solution

- Modernization- Move marketing to Salesforce Sales Cloud
- Transform - Marketing practices to leverage new capabilities

Think was engaged to assist in modernizing the way the organization marketed products that provide continuing education to attorneys. Much of this organization's value to its members is in big-room seminars that provide attorneys with continuing education credits; however, the organization also provided highly specialized products to attorneys that have specific areas of expertise.

All marketing and related correspondence with organization members was list-based and the marketing team decided to leverage new technologies to begin the use of modern marketing tools. Think worked with this organization to accomplish several tasks:

1. Setup and migrate legacy data to Salesforce - Original data to new structures, transformation, scrubbing, etc.
2. Train staff to maintain Members in Salesforce - dozens of new workflows
3. Train Marketing staff to use Sales Cloud to run campaigns - Two goals here:
 - a. Non-transformational, but revenue protective continuation of existing marketing model on new platform
 - b. Innovate marketing practices by developing content focused and dynamic campaigns

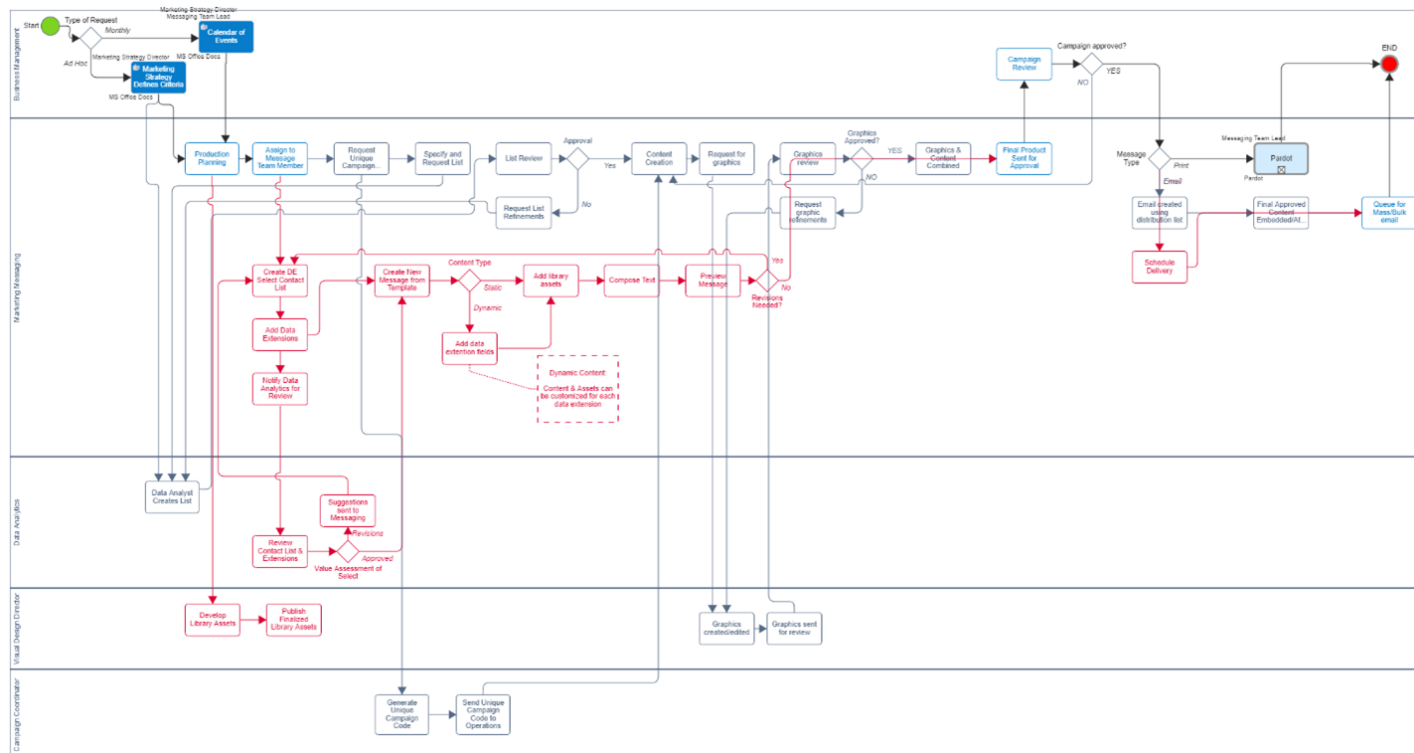
Modeling Process Change

For the actual engagement, Think did this the old-fashioned way. We rolled-up our sleeves, worked a cadre of talented people in the organization's marketing division and helped them develop a new marketing process model that we then created training around and deployed to their marketing team.



Since then, we've thought about how the engagement would have been different if we had our partnership with BusinessOptix at that time. We've created a notional model, based upon this engagement and others to show the power of process modeling over process drawing.

Here's an example of what it looks like...



It is important to note that this process diagram is the result of modeling, not just a picture. In this model we have represented:

- Organizational Model
- Systems Model
- Original Process (with drop, keep, transform annotation)
- New Process Model
 - Who does what and when
 - What systems are used or no longer used
 - Data about wait and process time (opportunities for future automation)

The outcome of this transformation was fantastic! Even in this notional model, you can see that many components/people went from a time-of-need, tactical support, mode of operation to a thoughtful and value-add one. The cycle time was reduced, new capabilities are being leveraged so that experts are able to perform more strategically.