

## Migrating From a Dated System to Salesforce



### Industry



Insure-Tech Focused on the Relocation and Transportation Sector - they provide API gateways so companies can add insurance products in their own system

### THE PROBLEM

Relocation Insurance has been using an Open Source CRM system. It was a tool they were able to download and install on their servers that met their business needs at that period. Over time, the management of the Open Source tool became an issue. Patches and updates needed to be self-installed and tested, losing countless staff hours that could have otherwise been repurposed to revenue growth and business management activities. It didn't make sense for them to continue. They needed a better solution.

### OUR SOLUTION

The leadership team at Relocation Insurance had chosen to move onto Salesforce but had very complex business processes requiring integrations to proprietary and legacy software built and/or integrated in-house. StarrData went through a thorough series of discovery and design meetings to develop project requirements, and to define the data structure of the new system on Salesforce. This established the parameters to move historical data and current business processes onto Salesforce seamlessly from aging systems.

### IMPROVED RESULTS

**Relocation Insurance has a contemporary and secure Salesforce system built to their business processes and staff needs. With the launch of their new instance, they project:**

- Increased staff efficiency through follow-up notifications for new customers and qualified leads
- Better customer data and segmentation through tracking interactions with content and campaigns
- Streamlined and simplified reporting from a system that contains all customer data, activity, and interactions with sales staff for a complete historical picture
- More staff and leadership time dedicated to business growth activities due to using Salesforce - a system that self-updates, is using current security measures, and is backed by technical support
- Customer support response times cut in half by APIs now integrated with Salesforce



#### Customer Quote

*"Salesforce will be foundational to our entire strategy going forward. We needed a CRM that's a good fit for us. We had to work out our plan with StarrData to determine how our instance should function."*

*The expansion and customization capabilities of Salesforce sold us on it as the right fit for Relocation Insurance. StarrData even helped us with the selection process and advised on which edition of Salesforce to use. They walked us through the whole process. Even our developers are head over heels with what's been set up. We would not have been able to do this without StarrData's help."*



**Geoffrey Stanton - Chief Operating Officer at Relocation Insurance**



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