

Clark Capital Management Group



Background

CCMG is a 100% family and employee-owned investment management firm based in Philadelphia, PA. By putting clients first, they have been named Barron's Asset Firm of the year. However, their investment in Salesforce was not paying off – old automations were not working, the adoption rates were low, and processes ran through Excel.



Objective

Client was advised to completely revise their processes by following Salesforce best practices. This included new automations and upgrades to their UI to increase user adoption. The goal was to move away from manual and tedious reporting in disparate systems; which was a resource drain. They also needed to simplify their activity logging processes.



Solutions

Cloud113 used an agile approach to implement an architecture that transformed the client's adoption rates .

- Updated infrastructure with automated functionality through APIs
- Reporting on data that cannot be completed with standard SFDC reporting
- TableauCRM in addition to increased security through Salesforce Shield

Results

CCMG's Salesforce user adoption was increased by 30% in the first year, allowing them to spend more time with their clients and less on data entry. All reporting is now done within Salesforce, saving them over 300 hours per year.



“Cloud113 has been a true partner in our growth story, we consider them an extension of our team”