CHALLENGE

ServiceSource needed a Customer Relationship Management System (CRM) to view and manage their contract and grant opportunity pipeline. They were managing this data in spreadsheets. They knew that by using Salesforce they could have better visibility and collaboration into their pipeline which would lead to greater efficiency to ultimately support more employment for people with disabilities.

ServiceSource

A LEADING RESOURCE FOR PEOPLE WITH DISABILITIES

"Internal collaboration and a true partnership with our ACC team made it easy to stand up a CRM System that will further enable growth and mission success in the future"

-Ashlie Strackbein, Vice President, External Affairs

SOLUTION

Agile Cloud Consulting (ACC) deployed Salesforce's Sales Cloud to achieve a one-stop view of opportunities and contracts in the pipeline and their status and category – customized to meet ServiceSource's reporting needs. ACC also configured InMail so all users see a complete view of engagement and Single Sign On and Multi-Factor Authentication for greater staff efficiency and system security.

ABOUT THE CLIENT

ServiceSource is a nonprofit organization with a mission to facilitate services, resources and partnerships to support people with disabilities and others they serve, along with their families, their caregivers and community members, in order to build more inclusive communities. **ServiceSource serves more than 30,000 people with disabilities annually.**

RESULTS

Technology implementations are most successful when a Customer has an active senior management champion and stakeholders have a voice throughout the project. ServiceSource had a senior management champion who was very involved and collaborative with both the ACC team and internal stakeholders at ServiceSource. She led the user acceptance training while the ACC consultant made live tweaks based on the feedback and consensus heard from the entire team. The end users were encouraged to voice their needs during all discovery sessions.

The outcome: ServiceSource built a solution meeting their end users' desired process and reporting needs all within budget and timeline.

ABOUT AGILE CLOUD CONSULTING

Agile Cloud Consulting provides end to end product development services. Our expertise extends beyond technology and into business process and strategic planning for the future. We specialize in for-profit, non-profit, higher education, and healthcare utilizing years of experience and hundreds of successful implementations to help you achieve your organizational goals.