

Lifting Expectations For Decades

Heavy Lifting through custom
Salesforce implementation



Innovating Heavy Lifting Solutions

Dearborn Crane, a leading player in the heavy lifting and crane manufacturing industry, has been at the forefront of providing robust and innovative lifting solutions to various industries for several decades. Operating in a highly competitive market, Dearborn Crane was seeking to enhance its operational efficiency and customer relationship management to maintain its industry-leading position. Recognizing the limitations of their existing Salesforce implementation, Dearborn Crane engaged us to overhaul their CRM system, ensuring it was tailored to meet their unique business needs.

The primary driver behind Dearborn Crane's decision to engage DTC Force was to migrate from an outdated Salesforce Org to a new, streamlined system that could better support their complex operations. They required a solution that would not only improve their internal processes but also enhance their ability to manage customer relationships effectively. Our proven track record of successful Salesforce implementations and our commitment to delivering tailored solutions made us the ideal partner for this critical project.

Scaling Challenges & Strategic Transformation

The primary objective of this project was to migrate Dearborn Crane's existing Salesforce Org to a new, customized Salesforce environment. The migration process involved extensive UI restructuring, data migration, and reconfiguring critical business processes within Salesforce. The goal was to create a more efficient, user-friendly system enabling Dearborn Crane to manage their operations more effectively and support their growth ambitions.

Revamping the CRM for Efficiency and Growth

- **Data and Structural Migration:** Transfer all relevant data and organizational structures to the new Salesforce Org, ensuring continuity and minimal disruption.
- **User Interface Overhaul:** Simplify and declutter the UI to improve user experience and operational efficiency.
- **Custom Solutions:** Develop tailored solutions within Salesforce to meet specific operational needs, such as enhanced data validation and process automation.
- **Training and Support:** Provide comprehensive training to ensure a smooth user transition and offer ongoing support to address post-implementation challenges.



A Phased Approach for Seamless Transition

The project was executed using a phased approach, which allowed for meticulous planning, execution, and testing at each stage. This methodology ensured that Dearborn Crane's operations continued with minimal disruption while the new system was being implemented.

Phase 1: Discovery and Planning

- Conducted detailed discovery sessions to understand the specific needs and pain points of Dearborn Crane.
- Developed a comprehensive project plan outlining the migration steps, timelines, and milestones.

Phase 3: User Setup and Customization

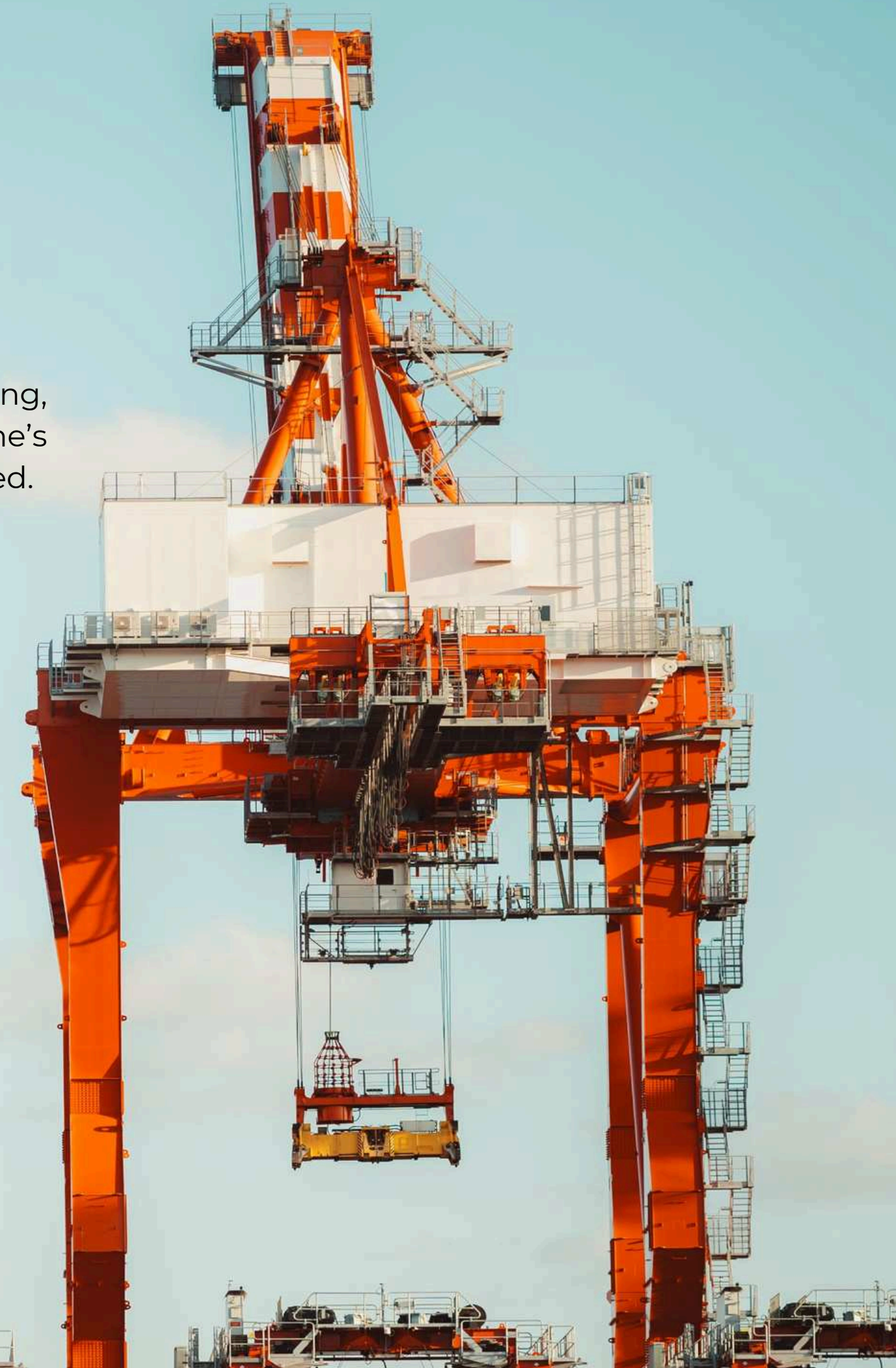
- Set up user roles, permissions, and profiles in the new environment.
- Customized Salesforce functionalities to align with Dearborn Crane's specific business processes, including installing the Milestones PM app for project management.

Phase 2: Data and Structure Migration

- Transferred all existing data, including accounts, contacts, opportunities, and leads, to the new Salesforce Org.
- Recreated and optimized data structures, including custom fields, record types, and page layouts.

Phase 4: Training and Go-Live

- Provided in-depth user and admin training to ensure smooth adoption of the new system.
- Coordinated a phased roll-out, allowing for final testing and user feedback before full deployment.





Overcoming Hurdles to Ensure Success

While the project was executed smoothly, there were several challenges that required strategic solutions to ensure the project's success.

Data Integrity Concerns

One of the primary challenges was ensuring the integrity of the data during the migration process. Given the critical nature of the data, any loss or corruption could have significantly impacted operations.

Solution: We implemented rigorous data validation and verification processes at each migration stage. This included running parallel tests in the legacy and new systems to ensure data consistency and accuracy.

User Adoption Resistance

As with any significant system overhaul, the end users, who were accustomed to the old system, initially resisted change.

Solution: We addressed this through comprehensive training sessions tailored to different user groups, ensuring all stakeholders were comfortable with the new system. Additionally, we provided continuous support post-launch to assist with any issues and reinforce best practices.

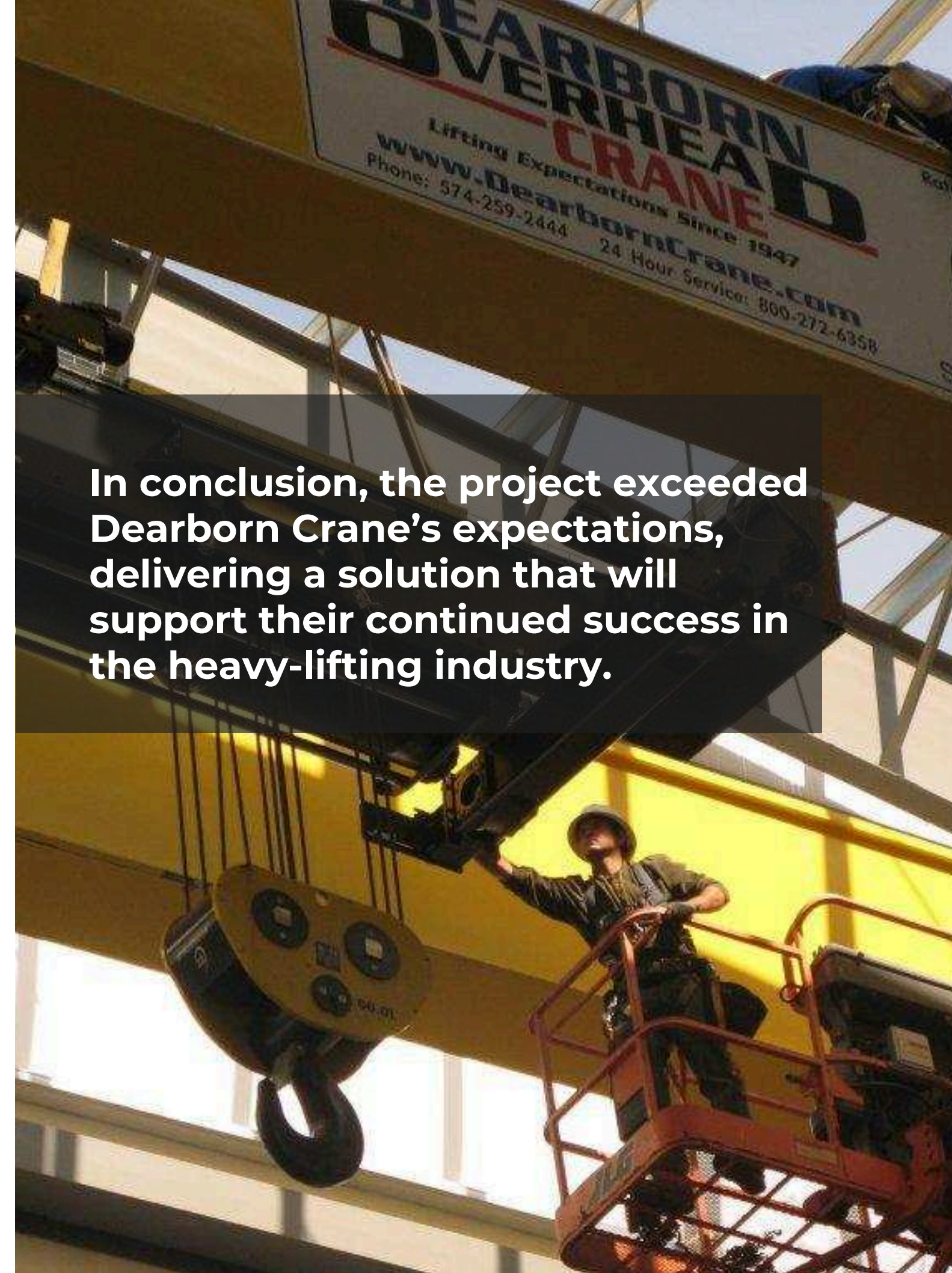
Transforming Operations for Enhanced Efficiency

The successful implementation of the new Salesforce Org had a profound impact on Dearborn Crane's operations, leading to significant improvements in efficiency and customer relationship management.

Operational Efficiency: The new, streamlined Salesforce environment reduced manual processes and data entry errors, allowing the Dearborn Crane team to focus on more strategic tasks. The improved user interface and custom functionalities also enhanced overall productivity.

Enhanced Customer Relationship Management: With a more organized and accessible database, Dearborn Crane could manage customer interactions more effectively, improving customer satisfaction and retention.

Future-Ready Platform: The new Salesforce Org provided Dearborn Crane with a scalable platform that can easily be adapted to meet future business needs. This positions the company well for growth and further innovation in the industry.



In conclusion, the project exceeded Dearborn Crane's expectations, delivering a solution that will support their continued success in the heavy-lifting industry.

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