

How to Move from Legacy CRM to the Cloud

INTRODUCTION

The digital age has opened up more ways for people to communicate than ever before. But with communication coming from so many different angles and mediums, it becomes fragmented, which takes away from giving customers what they really want: an exceptional experience. More than 66% of consumers say they change brands due to a poor customer service experience. If you want to create an amazing experience, you'll need to keep your customer service efforts in one place while still communicating with consumers the way they want to.

A great interactions are rooted in the software you use to manage customer information and how these systems empower your agents to make informed and memorable decisions. In this e-book we will show you how to improve your customers' experience and gain their loyalty by using powerful cloud technology based on *your* industry and *your* clients.

What you will learn:

- **WHY** industry-specific technology will help you stay competitive in an ever changing market
- **HOW** to move your customer support and retention efforts from legacy software to the cloud
- **WHAT** this migration means for your customers and your ability to retain them

TABLE OF CONTENTS

[CHAPTER 1: EVOLUTION OF CRMS: LEGACY TO THE CLOUD](#)

[Your legacy CRM is holding you back](#)

[What's in the cloud?](#)

[CHAPTER 2: GO HIGHER INTO THE CLOUD: FOCUS ON YOUR INDUSTRY](#)

[CHAPTER 3: CHOOSING YOUR MIGRATION GAME PLAN](#)

[Rip & replace: Build cloud CRM from the ground up](#)

[Roll out: Move to cloud CRM piece by piece](#)

CHAPTER 1: EVOLUTION OF CRMs: LEGACY TO THE CLOUD

Customer Relationship Management Systems (CRMs) have evolved over time in an effort to improve the way companies function and how they serve their customers. The first CRMs came in the shape of a mainframe. What they offered in stability, reliability and security was also weighed down by a system that required heavy lifting any time things needed updating. And, as it turned out, that was pretty often. To help simplify things, the client server evolved as a more flexible and efficient option. It made existing systems easier to update, but unfortunately, it still wasn't adaptive or mobile enough. In the last decade, cloud software has developed as the next step in database management, ensuring teams are able to work together and with their customers more efficiently, anywhere, anytime.

[INSERT IMAGE]

- Mainframe = reliable, available, secure
- Client/server = reliable, available, secure, flexibility, innovation, efficiency
- Cloud = reliable, available, secure, flexibility, innovation, efficiency, omni-channel, one source, adaptable, cost efficient, user friendly, in-depth analytics, available anywhere, anytime

Your legacy CRM is holding you back

We get it. Your CRM has served you well, so why fix something that's not broken? Because you want to be efficient, not sufficient. Here are a few tell-tale signs your legacy CRM is holding you back:

1. It isolates data into different compartments, leaving you with a broken view of the customer journey.
2. It's difficult to use and it's inefficient. Bouncing back and forth between multiple systems wastes time and energy, leaving your agents exhausted instead of empowered. The result? Bad customer service and a negative overall experience.
3. It's slow to innovate, costly to update and maintain, and doesn't work well with modern platforms.

In the long run, legacy systems are projected to cost companies more money because they require expensive internal IT teams to build and re-program the CRM as modern technology continues to change.

What's in the cloud?

The cloud solves the limitations of legacy platforms and delivers a better overall user experience by communicating with consumers on their terms, on the platforms they prefer. Companies no longer dictate the way we communicate—consumers do. So how do leading brands like Intuit, Sky Italia, and Telus meet the needs of modern consumers and retain them in a dynamic marketplace? By building brand love through an exceptional experience. Once consumers like you, they'll continue doing business with you.

Why you need to move to the cloud:

- Customers are communicating differently and you should too. They want a more personal experience. They don't want to feel like another number. They want complete control of their account anywhere, anytime. The cloud enables you to be more customer-centric and embraces omni-channel customer needs.
- It empowers agents with a seamless experience by giving them a 360 snapshot of all customer interactions on one platform, instead of multiple on-premise platforms that don't share data.
- It's more profitable. Because agents can analyze the situation faster with data in one place, they have more time and opportunities to up-sell relevant services.
- It's scalable. Track everything in one place with omni-channel cloud apps. Each channel is a separate experience but tracking and access metrics happens all in one secure place.
- It's innovative. The cloud allows you to use and test new technology like video chat to make sure you are keeping up with your customers' communication needs.
- Get built-in efficiency as your cloud provider handles the hard and costly part: constant software and app upgrades, maintenance, and custom builds.
- Go mobile instantly. Responsive solutions allow you to build once and deploy on any device, anywhere, anytime.

CHAPTER 2: GO HIGHER INTO THE CLOUD: FOCUS ON YOUR INDUSTRY

Let's face it, one-size-fits-all software doesn't fit you or your customers. Different industries have different interaction flows and communication preferences. Just like the process for signing up for health insurance is completely different than filing your taxes,

you need to personalize the process so your customers get a simple, efficient and relevant experience.

The industry-focused cloud is where you build apps and interaction flows that are designed for your industry's needs and best practices. It empowers you to respond better, without forcing you to completely abandon existing software. Industry-specific cloud software is customizable to fit your specific needs and allows you to integrate specific tools for billing, product catalogues, troubleshooting into a flow that makes sense for your business or institution.

[SIDEBAR]

We've focused on four industries that have the most to gain

Insert: Data on customer service rankings

- Public Sector
- Communications
- Health Insurance
- Insurance

[CASE STUDY]

CUSTOMER SPOTLIGHT: ABD Insurance

ABD Insurance and Financial Services is a top 10 employee benefits and property and casualty broker. Building a strong and pleasurable customer service experience isn't just about a good experience—it's essential for their business. Providing real-time information to their agents allowed the company to improve the client's journey from beginning to end. ABD partnered with Vlocity Insurance to integrate their back- and front-office systems to take service to the next level.

- CTA: [Read the full case study >>](#)

CHAPTER 3: CHOOSING YOUR MIGRATION GAME PLAN

Moving your CRM to the cloud doesn't have to be as painful, complex, or expensive as you think. When done right, it should pay for itself. No more expensive in-house programmers. No more crossed wires and miscommunication between departments. No more time wasted digging around for information on multiple back systems. No more losing customers because they were unhappy with their experience. It's these kinds of efficiencies that make your cloud CRM an investment that pays dividends long after it's implemented.

Plan your strategy and keep in mind that your path to migration may look different from others. There are two approaches to building your new CRM:

Rip & replace: Build cloud CRM from the ground up

The first migration approach lets you embrace simplicity and start fresh. We'll help you get up and running with a seamless and agile app in the cloud. You'll be able to bring all your data into your new cloud software. The perks of this approach are:

- You don't have to work around your old legacy CRMs or worry about the kinks of integrating multiple systems. Start with a sophisticated platform that keeps everything you need in one place.
- All aspects of your business are being tracked from the moment you go live.
- You save even more money since you're only paying for one CRM.

Roll out: Move to the cloud piece by piece

It might be tough to imagine moving everything into a new software platform all at once. Our second approach to the migration process is designed for institutions that need to roll things out at a more gradual pace. You can set up your legacy and industry-specific cloud CRM to co-exist during the transition so you aren't migrating everything at the same time.

Start with batches of information and break the migration process out into multiple phases. This approach naturally helps you prioritize certain parts of your business and gives you time to learn how you can maximize your customization options.

The biggest advantages of the "roll out" approach are:

- You get more options for migration and user adoption.
- You have more time to perfect interaction flows for agents and customers.
- You get to test new communication tools to see how your customers are responding.

[SIDEBAR]

GETTING STARTED: *HOW TELUS DID IT*

Telus, a leading telco company, doesn't just promise better customer service—they've made it their passion and key differentiator. So when it came time to improving certain initiatives like reducing call handling time, generating quotes faster, upselling, and communicating through various channels, they came to Vlocity to help build a better system to manage their account relationships. They strategically rolled out the new CRM to a test group of 1,100 agents. After seeing real results, they rolled it out to their entire 20,000 customer service team. Over time, they perfected the system to create a far better experience for their agents and their customers. The result? Really happy and loyal customers.

[QUOTE]

“We gave Vlocity our most complex use cases and assigned our best architect to dig deep and find the holes in (our system). But the deeper we went, the better Vlocity got.”

Director, CRM Enablement

Brad Pruner

TELUS

- [CTA: Read the full case study >>](#)

CONCLUSION

Creating unforgettable customer interactions is no longer about differentiation. It's becoming an expectation. The industry-specific cloud CRM gives you the power to be more agile, efficient, personal, and mobile. It makes for happy customers, and ultimately, a happy customer is a loyal one.

Vlocity's industry-specific cloud software creates one place to communicate and view all customer interactions—whether they're on social media, chats, video chat, phone calls, orders or email—so you can communicate faster and smarter. It gives your customers a superior experience from any device, anywhere, anytime so they will keep coming back.

- [CTA: Request Your Personal Demo](#)