

# Software Company Removes Departmental Silos & Improves Data Management



## Company Info

### Industry:

High-Tech & Security

### Company size:

51-200 Employees

### Company location:

Toronto, Ontario  
Canada

## Products & Services Used



## Success Story

### Summary

A Toronto-based security software company was using a CRM system and associated technology stack that did not fit their needs or integrate with each other. This led to poor data management, departmental silos, and process inefficiencies. MasterSolve migrated the company onto the Salesforce platform and integrated new tools that addressed specific departmental needs.

### The Challenge

The organization's technology stack did not meet their needs and did not integrate well with their current CRM system.

Each department at the security software company was using different technologies. Many of the technologies did not meet specific needs, communicate with one another, or integrate with the CRM.

**Disconnected technology stack:** Users were required to switch between multiple platforms to log, find, and utilize data. This led to wasted employee time, duplication of data, and departmental silos.

**Inadequate marketing technology:** The marketing team was paying for a clunky marketing automation platform that did not integrate with their CRM or improve marketing effectiveness.

**Inadequate customer support technology:** The support team was using an outdated, inadequate customer support technology that required too much manual work from customer service agents.

## ◀ The Solution

Migrate the organization to Salesforce and integrate new technologies.

First, the MasterSolve team implemented Salesforce, migrated all historical data into the new system, and set up 30 users on the new platform.

Next, MasterSolve worked with departmental leaders to understand what technology stack would help them achieve their goals. After these conversations, MasterSolve suggested that the team move from their current marketing automation platform to Salesforce Pardot and from their current customer support solution to Experience Cloud.

MasterSolve helped the company implement and integrate these new tools. Specifically, they helped the organization set up their Salesforce Experience Cloud to include a help center, knowledge base, online tutorials, and a website chatbot.

## ◀ The Outcome

This security software company now has a transparent, 360-degree view of all customers within a single platform. This has saved end-user time, enabled more effective collaboration among departments, and helped the organization keep their data clean.

By using Pardot, the marketing team is able to track campaign performance, seamlessly hand leads from marketing to sales, and ultimately reduce marketing funnel leakage.

With Salesforce Experience Cloud, the organization is able to provide a positive customer experience, while reducing customer service agent workloads.

Do you need help optimizing your CRM?

[Reach out to our team of certified CRM experts today.](#)



**Reduced marketing funnel leakage**

**Gained a 360° view of customers across all departments**



**MasterSolve**  
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