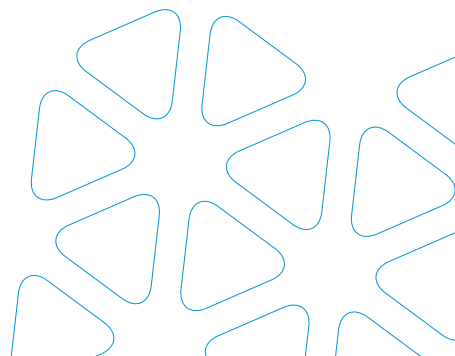




A Unified View

A STORY OF OWNING CHANGE



T. Rowe Price harnesses the power of Salesforce Financial Services Cloud

A global leader in the investment industry, T. Rowe Price empowers people and businesses to achieve their financial goals. With a presence in 47 countries and over \$1 trillion in assets under management, they take their clients beyond numbers with strategic investing.

THE PROPOSITION:

Eager to evolve

T. Rowe Price wanted to upgrade their customer relationship management (CRM) tracking system. The goal? Integrating multiple in-house systems into a single, cloud-based platform for a more holistic view of all sales and services activities. They envisioned their sales team better equipped with critical intel for improved service, delivery, lead capture and ultimately, selling.

OUR PROPOSAL:

One for all

Goodbye, legacy systems. Hello, Salesforce Financial Services Cloud (FSC). Partnering with T. Rowe Price, we designed and built a modern, shared platform to unite their sales, services and management teams. Generating a 360-degree view of their clients.

Migrating over 20 million customer, financial and interaction data records into Salesforce, users now have access to critical information they need—when and where they need it. Enhanced transparency and traceability powering productivity, customer satisfaction and revenue growth.

POWERFUL PARTNERSHIP:

A huge jolt of ROI

The path to success isn't always straight and narrow. That's why flexible partnership is the active ingredient. Leveraging our practice capabilities and off-shore delivery centers, we scaled to achieve T. Rowe Price's vision. When priorities changed, we changed with them. We created technical roadmaps, thoughtfully crafted to minimize their initial investment and reduce the total cost of ownership.

Because FSC is designed for the Salesforce Lightning Experience, we optimized a Lightning-first implementation. T. Rowe Price could immediately take full advantage of the platform's latest features and functionality, minimizing the costs incurred from technical debt. With reduced maintenance costs and continuous product innovation, real ROI was generated.



Real-World Results

Transformation, achieved. T. Rowe Price went from juggling disparate applications to one unified platform. Now with the ability to see everything about a single customer in one interface, it was time to get to work. Within two weeks of upgrading, internal user adoption reached 86 percent. Within a year, over 11,400 customer interactions were logged and over 2,200 net new opportunities were added—yielding a potential for \$255 million into their sales pipeline.

Critical intel, delivered. Customer satisfaction, improved. Internal user adoption, through the roof.

With us by their side, T. Rowe Price plans to continuously optimize and evolve their next generation of wealth management products via Salesforce. They envision new iterations every year shaping technical and business solutions. Powerful results that power performance.

\$255M

in sales pipeline

11,400+

customer interactions
logged

2,200+

net new
opportunities added

About TEKsystems

We're partners in transformation. We help clients activate ideas and solutions to take advantage of a new world of opportunity. We are a team of 80,000 strong, working with over 6,000 clients, including 80% of the Fortune 500, across North America, Europe and Asia. As an industry leader in Full-Stack Technology Services, Talent Services and real-world application, we work with progressive leaders to drive change. That's the power of true partnership. TEKsystems is an Allegis Group company.

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