

Forty8Fifty Labs Reduces CRM License Bloat for Financial Service Provider by Migrating IT Service Management to Atlassian

Financial Risk Management Platform Provider Migrates Workflows Out of Salesforce to Jira Service Management to Automate Ticketing for Faster Incident Response and Improved Reporting

Overview

Trusted by some of the world's largest companies and government agencies, this provider of an AI-powered financial management platform monitors and analyzes financial transactions, reducing audit effort and eliminating data silos. It also works to help identify fraud, misuse and process breakdowns while minimizing financial risk.

Challenge

Historically, this financial management platform provider had been tracking all customer tickets and service desk requests using the company's CRM platform, Salesforce. Over time this had become both costly and unwieldy, bloating its Salesforce licensing and impeding service desk agent response time.

By using Salesforce to support the service desk workflow, the financial management platform provider was also facing limitations in producing the critical reports and dashboards needed to ensure the superior service its customers expect.

A company that highly values advanced technology, including AI and data analysis, for its own platform, this financial management platform provider wanted to enhance its support services with the same level of modern, agile power. The challenge? Migrating its years

Industry

Financial Services

Use Case

Migrate service management data from Salesforce CRM to Atlassian Jira Service Management while maintaining data hierarchy and data model for a more agile and automated solution that supports faster incident response and more useful reporting.

Products

- Forty8Fifty Labs Atlassian consulting, professional and migration services and custom training
- Atlassian Jira and Jira Service Management
- Atlassian Confluence
- Mindville Insight and Insight Discovery (formerly Riada)
- Forty8Fifty Labs SmartHandler for Mail



of service history, including the historic data model and hierarchy, it had built over time in the Salesforce CRM.

With Salesforce licensing bloat growing and limited service visibility continuing to plague the process, the financial management provider needed to embrace a more modern IT service management (ITSM) solution. After evaluating its options, Atlassian Jira Service Management, a solution already used by the company's internal development team, was selected.

Jira Service Management would help them resolve issues faster, as an integrated team, through workflows that are more flexible, collaborative and adaptive. Yet, there was no clear way to migrate the historic data out of Salesforce to Jira Service Management while retaining the custom structure the service team had so specifically designed and established.

Among the key criteria for the new solution was also to more accurately automate incoming service emails - which could request a range of services from financial process requests to adding new users, account updates and password resets - automating ticket creation from the emails for enhanced support and rapid customer resolution.

Solution

The financial management platform provider contacted Forty8Fifty Labs to see if they were up for the challenge. As an Atlassian Enterprise Platinum Solution Partner and Atlassian Technology Innovator of the Year, 2019, Forty8Fifty Labs is an expert in architecting Atlassian solutions to solve even the most difficult scenarios. This was no exception.

Forty8Fifty Labs first worked to recreate the financial management platform provider's Salesforce data model. Having adapted a CRM for this ITSM-related workflow the data model had grown to be exceptionally complex. Using Mindville Insight and Insight Discovery (formerly Riada) for asset management, Forty8Fifty Labs was able to recreate the Salesforce hierarchy and data model without requiring Jira Service Management to write to Salesforce. This eliminated a persistent Salesforce connection, separated the service desk data from the Salesforce instance and reduced Salesforce license costs.

Success Highlights

- Migrated service desk data from Salesforce to Jira Service Management retaining historic data model and hierarchy
- Dramatically reduced Salesforce license bloat and costs
- Created modern "record of service" based on Jira Service Management for more agile, scalable and responsive customer service



Forty8Fifty Labs then migrated the data to Jira Service Management and architected the solution to offer enhanced automation for emailed requests. Using Forty8Fifty Labs' SmartHandler for Mail, the new solution automates the creation and updates of tickets based on emails. This streamlines service management and ensures more rapid ticket resolution. Today, Jira Service Management is now the service desk reference of record for the company, enabling greater automation for incoming email service requests and enhancing ease of use for the service desk team.

Results

The newly designed Jira Service Management solution, supported by the migration and customization delivered by Forty8Fifty Labs, has given this financial management platform provider a powerful new way to support customers - without increasing complexity and bloat in their Salesforce CRM. The company has also significantly reduced service desk churn and is more prepared to deliver rapid response and resolution to emailed service requests. Even more, no valuable historical customer data was lost in the process. All the data records were efficiently piped into the new Jira Service Management solution so that the service desk team isn't missing any critical detail needed to deliver the superior support the company has become known for.

Data reports and dashboards from Jira Service Management have also proved to be increasingly valuable for pinpointing issues that need greater prioritization and more effectively staffing the service desk team. Going forward, the financial management platform provider is expecting to implement a customer-facing web portal, using Jira Service Management, for even more self-service efficiency. In all this has showcased that the migration to Jira Service Management has properly positioned the financial management platform provider to scale into the future.

For more information, visit: <https://www.forty8fiftylabs.com/atlassian/>

