

# Private Equity Value Creation by Transforming Salesforce Effectiveness



**Country**  
North America

**Industry**  
Hi Tech

**Service offering**  
Implementation

**Technology**  
Transformative Solutions

In the fast-paced world of mergers and acquisitions, a premier provider of unified IT management and security software for managed service providers (MSPs) and a leading global provider of security and cloud-based software solutions embarked on an acquisition journey. However, the global customer base anticipated more functional, innovative, and integrated solutions post-acquisition. To meet these expectations and ensure a successful outcome, the investors turned to CRMIT Solutions for assistance.

## Business Challenges

The merger brought forth several challenges, including the integration of disparate CRM systems with inconsistencies, duplicate records, and data conflicts. Moreover, the company grappled with varied and complex processes and workflows, necessitating compromise and meticulous mapping. Additionally, post-merger concerns revolved around ensuring business continuity and uptime of mission-critical platforms and integrations.

## Solution Details

Leveraging the transformative power of CRMIT's Customer360++ Framework, the Salesforce consulting team spearheaded a comprehensive turnaround initiative. By implementing tailored solutions and strategic optimizations, the team addressed the challenges head-on, laying the foundation for significant improvements in salesforce effectiveness.

## The Different Levers of Value Creation in Private Equity



**Operational Improvement**



**Growth Initiatives**



**Cost Optimization**



**Capital Allocation and Financial Management**

## Value Delivered

**67%**

Increase in  
Salesforce utilization

**38%**

Reduction in  
cost of goods sold (COGS)

**2X**

Return on  
investment upon exit

## Conclusion

Through strategic collaboration and innovative solutions, CRMIT Solutions played a pivotal role in transforming Salesforce effectiveness for the private equity company. By overcoming challenges and driving tangible results, the partnership exemplifies the power of leveraging expertise to navigate complex business landscapes and achieve unparalleled success.