

CRM System Transition Project Management Case Study

VIP

VIP SOLUTIONS CASE STUDY

BACKGROUND

A healthcare staffing company required project management support to coordinate the transition from a home-grown CRM to Bullhorn, a cloud-based system.

OBJECTIVES



Review current state and design future state of the new CRM



Prepare and get signoff from all coordinated parties on the overall project plan.



Project manage the project plan to ensure tasks are completed on time, provide the expected functionality, and are implemented successfully.

SOLUTIONS



Developed and project managed system transition plan.



Conducted data mapping, data migration, process review, quality assurance testing, and training.



Supported profitability of the business through the COVID pandemic by enabling remote access to new, cloud-based CRM.

**Healthcare
Staffing
INDUSTRY**

**200
EMPLOYEES**

**\$150M
ANNUAL
REVENUE**

**Successful
CLOUD-BASED CRM IMPLEMENTATION**
enhancing profitability & productivity