
DATA TRANSITION / CUSTOM SOFTWARE

A new CRM.

The relationships that matter, carried forward.

For an established equipment manufacturer with an international distributor network, replacing its CRM means carrying forward the connections between companies, locations, contacts, and customer history.

IMSKC is combining legacy data mapping with custom software development to build a platform around the sales team's actual workflows. The aim is to make those relationships easier to work with as the business evolves.

01

Understand

The business behind the data

02

Build

Workflows shaped by relationships

03

Validate

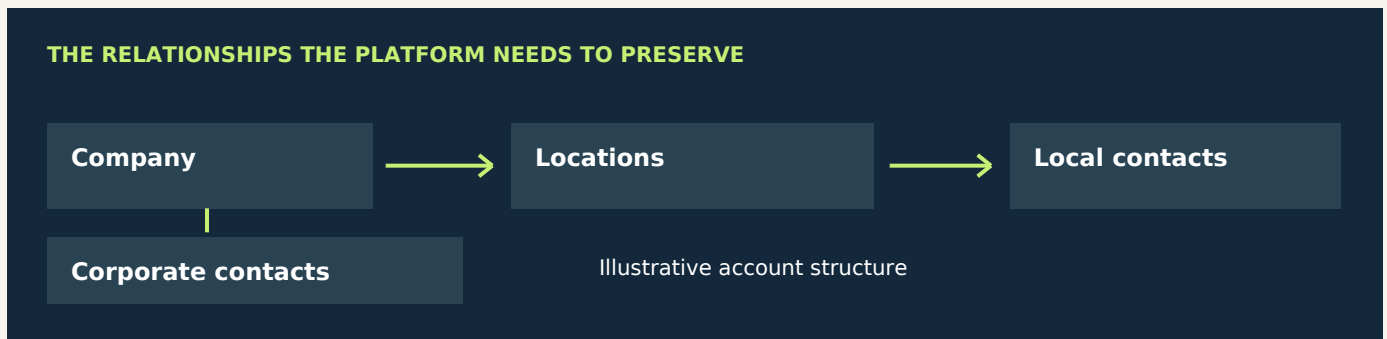
Workflows confirmed

WORKFLOWS VALIDATED / Production transition is a separate milestone

01 / UNDERSTANDING THE TRANSITION

The business relationships behind the records.

A useful replacement starts with understanding what the existing data means to the people who depend on it.



The manufacturer's sales team works across several connected levels of customer information. A company can have individual locations, each with its own contacts, while corporate contacts sit at the company level. Billing, shipping, and purchasing relationships also need to remain distinct. Together, these records describe how the team understands and manages an account.

That structure made the CRM transition a data project as much as a software project. Moving information into a new platform would only be useful if the connections remained understandable and usable. A contact needed to appear with the right location, that location needed to belong to the right company, and the team needed to find the information through a workflow that made sense.

IMSKC began with extensive data mapping and working sessions with the client's technical contact. The work focused on understanding the existing database and determining where customers, companies, locations, contacts, notes, and related records belonged in the replacement system. Those decisions established the foundation for both the transition and the interface.

The resulting design retains the familiar customer-to-location-to-contact workflow while introducing a shared master-company structure. Company-level and customer-oriented views are intended to use the same underlying company information. This gives the new platform a consistent foundation without asking the sales team to abandon the way it understands its accounts.

The data model shapes how the team works.

02 / TURNING THE DATA MODEL INTO SOFTWARE

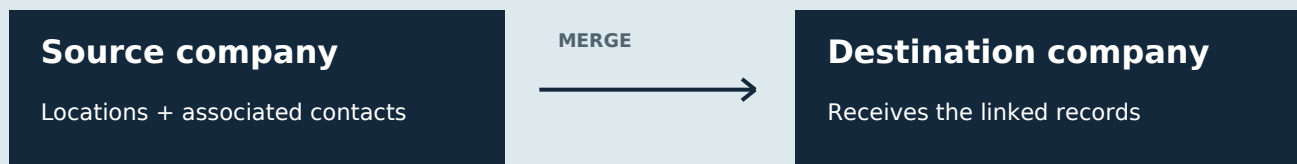
Built around how accounts change.

The relationships preserved during migration also need to be maintained during everyday use.

Mapping the existing records establishes where information belongs. The migration scope then carries that understanding into the new database: defining tables, relationships, and indexes; adapting existing structures; and normalizing or transforming data where needed. It also includes resolving discrepancies that could affect functionality or reporting and preparing the import and validation processes.

Those same relationships shape the custom workflows. If a location needs to move between companies, users need a way to update that association. If company records need to be consolidated, the locations and their associated contacts need to move together. IMSKC has developed explicit location-transfer and company-merge functions to support these changes.

IN PRACTICE / COMPANY MERGE



Illustrative workflow. The validated merge keeps transferred locations and their associated contacts linked.

The developed platform also provides separate management and transfer of Bill To, Ship To, and Sold To locations, alongside corporate contact management within Company View. Location-specific contact displays retain the selected customer and location when users switch views. These details keep the interface connected to the account structure behind it.

Required-field, contact, and location-relationship checks add another layer of consistency when users maintain records. Together, these capabilities connect the initial data transition to the platform's ongoing purpose: helping the team manage customer relationships as they change. The workflows have been validated against the way the team manages its accounts.

03 / VALIDATING THE WAY PEOPLE WORK

Familiar workflows. Validated for the team.

Workflow validation connects the custom platform to the sales team's real tasks.

The CRM scope combines search, saved searches, inline editing, and notes with follow-up dates, salespeople, and priorities. Prototypes and working demonstrations let the team review the experience as development progresses. In an early demonstration, the client confirmed that the look and feel was familiar.

The account workflows have now been validated. These include company merging, transfers across Bill To, Ship To, and Sold To locations, corporate contact management, and data-entry checks. Alongside profiles, notes, navigation, and permissions, they give the team a platform shaped around its account relationships.

THE PATH TO RELEASE

Developed

Core account workflows



Validated

Account workflows



Before launch

Final import checks

With workflow validation complete, the remaining transition milestones concern the production data and release. The planned final import includes reconciliation of record counts, relationships, and critical business data, followed by checks that the imported information is accessible and functions correctly. These migration checks remain distinct from validation of the platform's workflows.

Requests for personalized call lists, reminders, and sales or shipment visibility have also been captured for evaluation beyond the initial build. Their delivery depends on agreed business rules and available data. The core project establishes the foundation for that evolution: a CRM shaped by the client's information and workflows, with a deliberate path from legacy records to everyday use.

Your workflows should shape what comes next.

Let's talk about your CRM project. | imskc.com

Workflows are validated. Final production migration, launch, adoption, and measured business improvements are separate milestones.