TOKARA SOLUTIONS®

AAA Western and Central New York

FINANCIAL SERVICES

Salesforce

Who They Are

As Upstate New York's largest member organization, AAA Western and Central New York provides **more than 800,000 members with travel, insurance, as well as financial and automotive-related services**. With over 500 associates across three major metro areas – Buffalo, Rochester, and Syracuse – AAA serves its members 24/7/365 with emergency road service. While they are best known for helping their loyal members on the roadside, they also offer travel and insurance services to their membership.

Solutions

AAA had relied on its legacy CRM system for over a decade, but the platform's limitations became increasingly problematic. Based on AAA's business needs for its customer relationship management system, including its architecture and coding requirements, AAA made the decision to move to Salesforce.

The decision to move to Salesforce wasn't just about technology; it was about **unlocking new opportunities for growth, efficiency, and customer engagement.**

With this vision in mind, AAA turned to Tokara Solutions to guide them through the transition, knowing that **Tokara's expertise in both Salesforce and the financial services industry** would ensure a successful and transformative migration.

Success Story

After the initial migration, which was managed by the Salesforce Professional Services team, Tokara seamlessly took over to ensure that AAA's CRM journey continued to evolve and deliver results. With over **eight years of partnership**, including their time supporting AAA's legacy CRM system, Tokara utilized their unparalleled expertise and a deep understanding of AAA's business needs to maximize the value of their Salesforce Solution.

> "On a scale of 1 to 10, with 10 being the highest level of availability and skill, I would confidently rate them a solid 10. Their expertise and dedication are unmatched."
>
> Lisa Goff -
> Sr. Manager - Application Administrator

With Tokara Solutions stepping in to build on the foundation laid during the migration, Tokara took AAA's CRM system to the next level, implementing customizations and enhancements that aligned with AAA's business goals. Key initiatives included:

- **Automating manual tasks** such as branch lobby management and outbound calling program.
- **Enhancing security** with advanced permission sets.
- **Customizing marketing preferences** to better target current members.
- **Optimizing travel workflows** to better suit their travel agents.
- **Providing a single-pane-of-glass view** for tracking leads, opportunities, and business performance, enabling upselling and cross-selling opportunities.

Moreover, Tokara's responsiveness and technical acumen have been key to AAA's success. Weekly check-ins (and even weekend support when needed) ensured quick resolution of issues and continuous improvement of AAA's Salesforce CRM system.

Tokara also supported AAA's Mulesoft integration, with their expert team refactoring existing code to optimize performance. AAA credited Tokara for helping them achieve productivity improvements through pre- and post-go-live KPIs, further demonstrating the partnership's value.

Looking forward, **AAA is exploring expanding their partnership with Tokara to include Field Service management,** further building on the trust and results they've experienced.

By blending Salesforce expertise with industry knowledge in financial services, Tokara Solutions has become an indispensable partner to AAA, helping them achieve their CRM goals and drive business success.

> "When we reach out via email, the response is always quick—typically within 15-20 minutes. The team is consistently there for us whenever we need support, and that reliability makes a huge difference."
>
> Peggy Taggert -
> IT Systems Analyst

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