



NEOMATIC M

**build your business with NEO
experience**



We are a Business & IT Consulting company specialized in Sales, Marketing, Service, and IT.

SERVICE SPECTRUM

- Strategy, Business Analysis & Conception
- SAP & Salesforce Implementation
- Application Management
- Nearshoring
- Apps & Services

TOPICS

- Customer Experience Management
- CRM / Marketing, Sales & Service
- Commission Management
- BI/DWH & Analytics
- Transformation & Change

TECHNOLOGIES



FS ICM, BW, SAC, FIORI



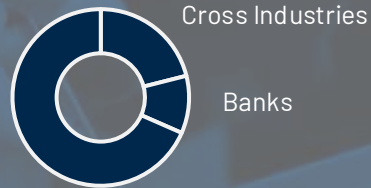
Marketing, Sales, Service,
Account Engagement,
Experience, Analytics

100%

Follow-Up
Project Rate



INDUSTRY FOCUS



CONSULTING TYPES

- Deliverables (Project-Based Business)
- T&M (Project Services)
- T&M (Support Services)
- Solution-as-a-Service
- Pay per Use

LOCATIONS

Cologne
Berlin
Copenhagen
Tbilisi



NEOMATIC is **fair**

NEOMATIC is **approachable**

NEOMATIC is **reliable**



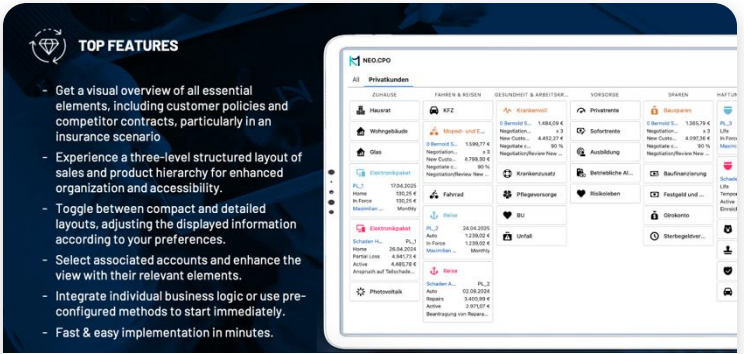
**Long-Term
Partnerships**



**Long-Term
Customer Relationships**



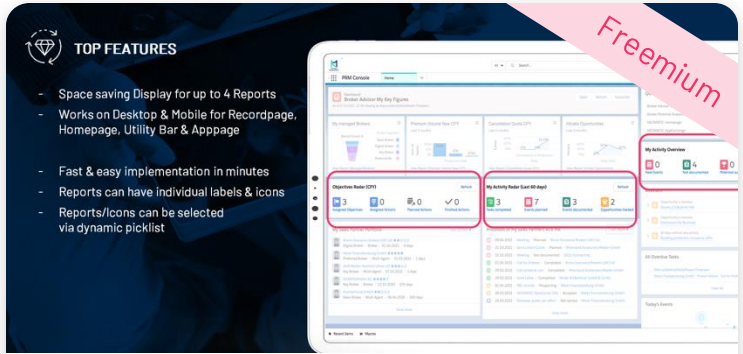
Our NEO Apps



Customer Portfolio Overview

NEO.CPO is a Salesforce UI component that optimises a 360° customer view. It visualises key elements such as opportunities and contracts. NEO.CPO is suitable for all industries and offers readily available content tailored to the insurance sector.

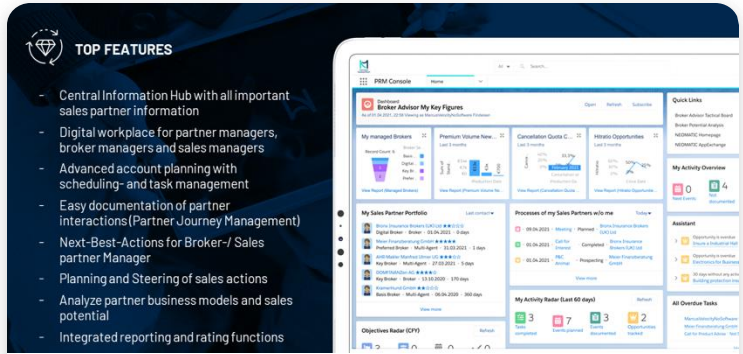
- Sales Productivity
- Sales Intelligence
- Data Visualization



Universal Mini Dashboards

NEO.UMD allows you to use a mini-dashboard in Salesforce anywhere, anytime. It consumes the reports you have already created and comes with various key figure visualisations.

- Data Visualization
- Dashboards & Reports



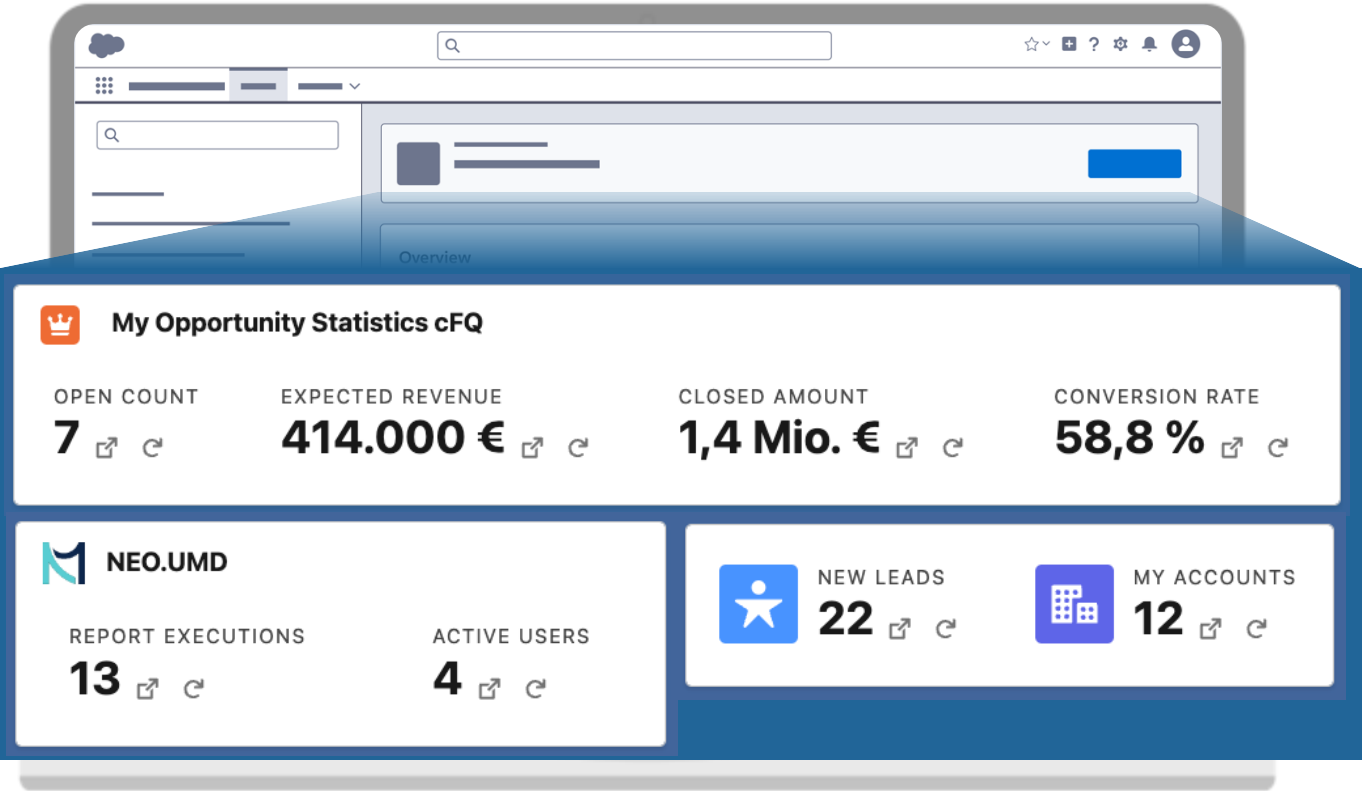
Pro-active Sales Partner Management

NEO.PRM is a proactive Partner Relationship Management for insurance sales. Efficient management of all sales partners, brokers and cooperative sales organisations to identify and exploit sales opportunities.

- Productivity

With NEO.UMD, your most important KPIs are always in view

Compact dashboards, precise visualizations, and quick deep dives—exactly where they are needed.



KPIs contextually available



Place KPIs precisely in Salesforce: Home/App Pages, Record Pages, Community Sites, and Mobile.

Use reports intelligently



Use existing reports efficiently and in context, but also create new.

Accelerate decisions



Compactly displayed relevant data for faster and better decisions.

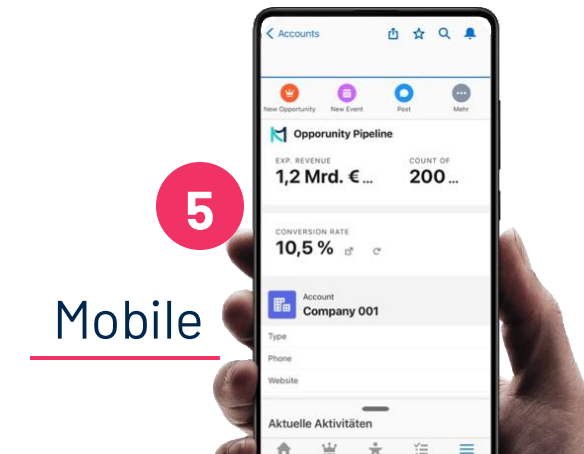
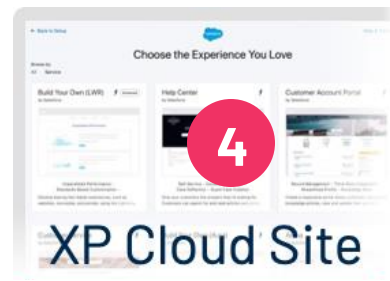
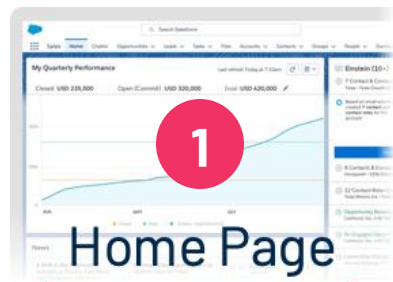
Quick start, flexibly expandable



Easily implemented, start for free, and scale as needed.

NEO.UMD can be integrated at all key points

Place KPIs specifically in Salesforce: Home Pages, Record Pages, App Pages, XP Cloud Sites (formerly Community Sites), Forecasting Page, and in the Mobile App on Records.



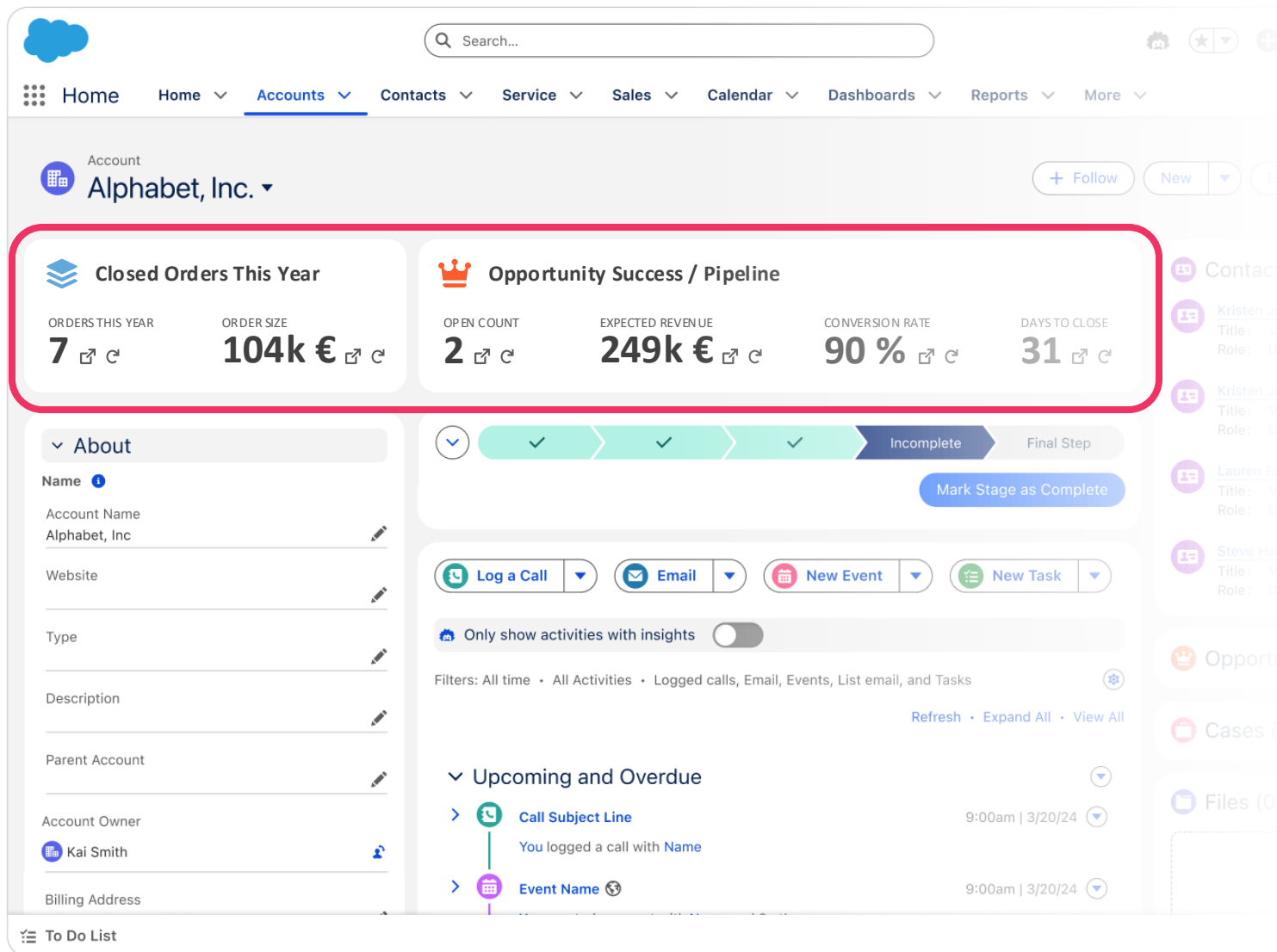
- 1 Optimize the Salesforce **Homepage** by integrating NEO.UMD. Place compact, context-relevant dashboards to always keep the most important KPIs in view—space-efficient and clearly displayed.
- 2 Integrate NEO.UMD into an **App Page** to create tailored dashboards for different teams. Display the most important KPIs in context and combine them with relevant reports and actions—all in one place for quick decision-making.
- 3 Integrate NEO.UMD on a **Record Page** to display KPIs directly on the respective record. Get precise, context-relevant insights that help make informed decisions quickly and efficiently.
- 4 Provide your customers and partners with compact, context-relevant KPIs via the **Experience Cloud**. Deliver important information clearly and concisely.
- 5 Use NEO.UMD in the Salesforce **Mobile** App to keep your KPIs accessible everywhere—available for records.
- 6 Enhance Salesforce's standard **forecasting** with NEO.UMD to display forecast-related KPIs in an aggregated and clearly visible way. Highlight critical forecast data prominently and focus on supporting targeted decisions.

NEO.UMD on Record Pages – KPIs in the Right Context

Relevant key figures, directly to the point – individualized, compact, and always accessible.



Record Page



Compact KPI Visualization

Up to 4 KPIs can be displayed in a mini-dashboard, based on aggregated values from reports.

Contextual KPIs

KPIs can be filtered by the dataset (in this case, the Account) to provide context-specific insights.

Flexibility and Customization

Multiple mini-dashboards can be added, and individual labels can be assigned to each selected KPI background.

Efficient Data Processing

Faster data loading thanks to data caching and optimized performance.

Simple Navigation

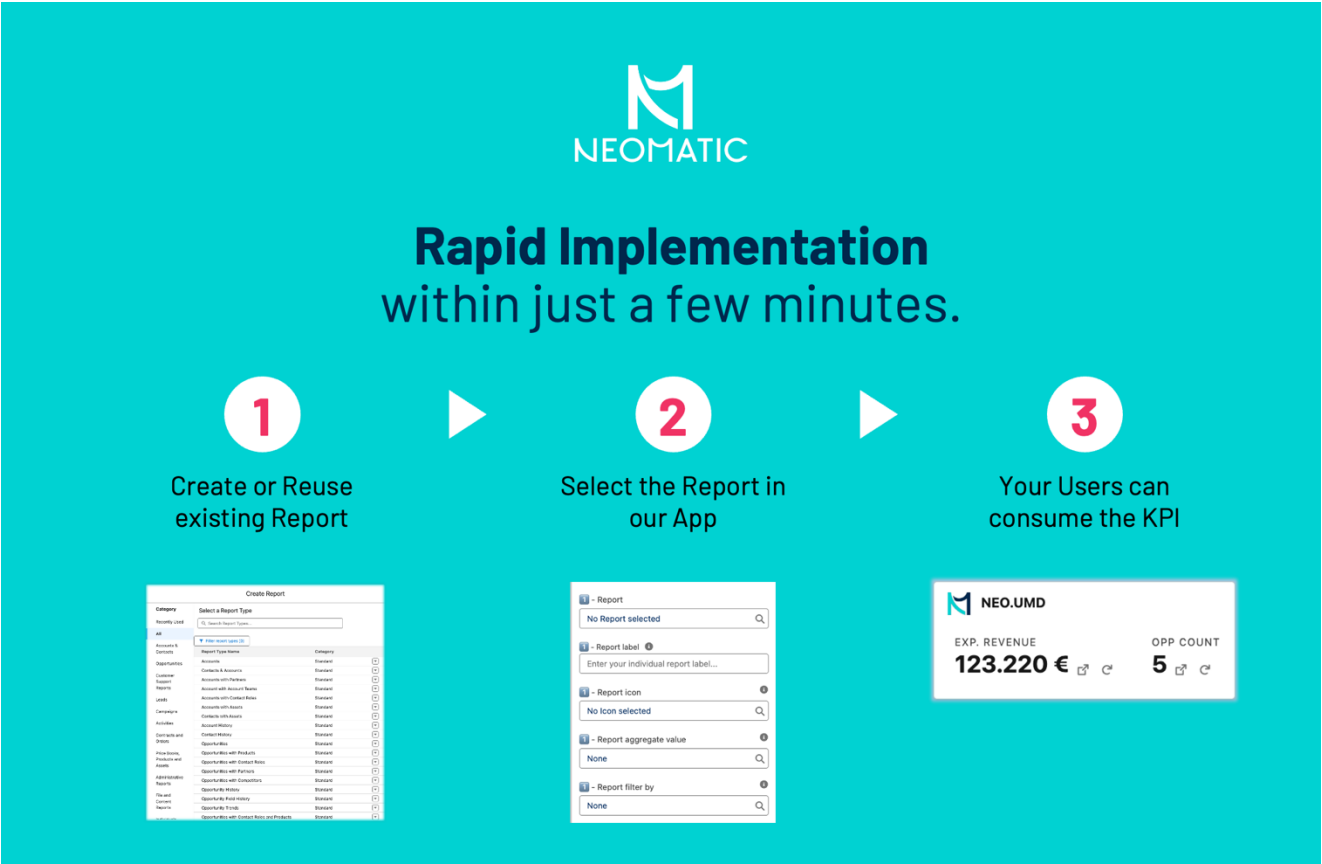
Direct links to reports for detailed insights are now possible.

Localized Values

KPI values are automatically formatted based on local settings.

All added values are reachable within just a few minutes

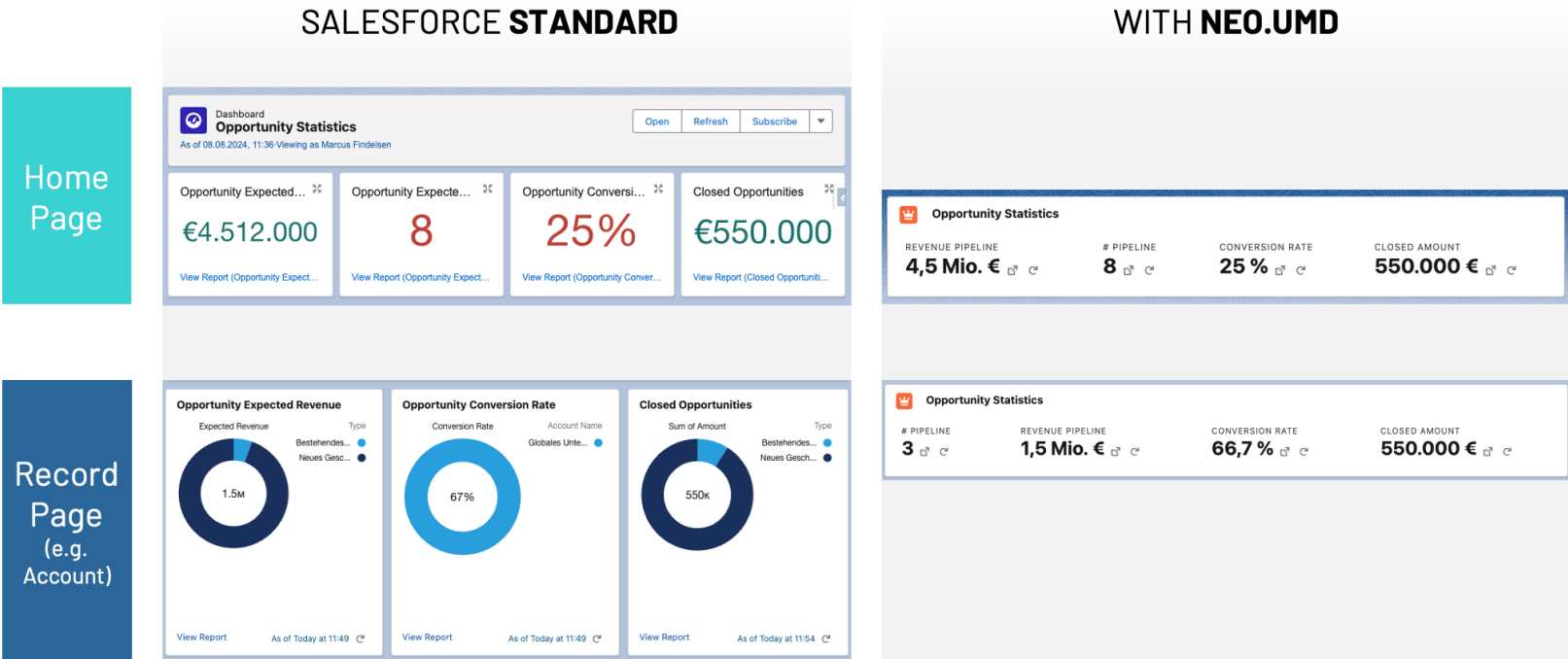
Setting up NEO.UMD is simpler than ever and only requires an administrator.



- 1 Create new reports with the Report Builder or use existing reports.
Ensure that you have defined the so-called Aggregated Values—KPIs that are prominently visualized in the header of the report.
- 2 Open the Lightning Page where you want to integrate KPIs and drag & drop the NEO.UMD Lightning Component to the appropriate location.
Select one or multiple reports and the respective Aggregated Values (KPIs).
You can also assign labels and icons.
- 3 Now simply save the Lightning Page and activate it if necessary, and users can start using NEO.UMD and benefit from all its added values.

Advantages of NEO.UMD vs. SF Standard at a Glance

SALESFORCE - APPS
NEO.UMD - COMPARISON TO STANDARD



Space-Saving Display

Reduces space usage through a compact, text-based display and allows for more information in less space.

Quick Information Access

Presents the most critical numbers directly, without visual distractions, which accelerates decision-making.

Consistency Between Home and Record Pages

Unified display on both pages, enabling users to orient themselves more quickly.

Shortcuts and Clear Display

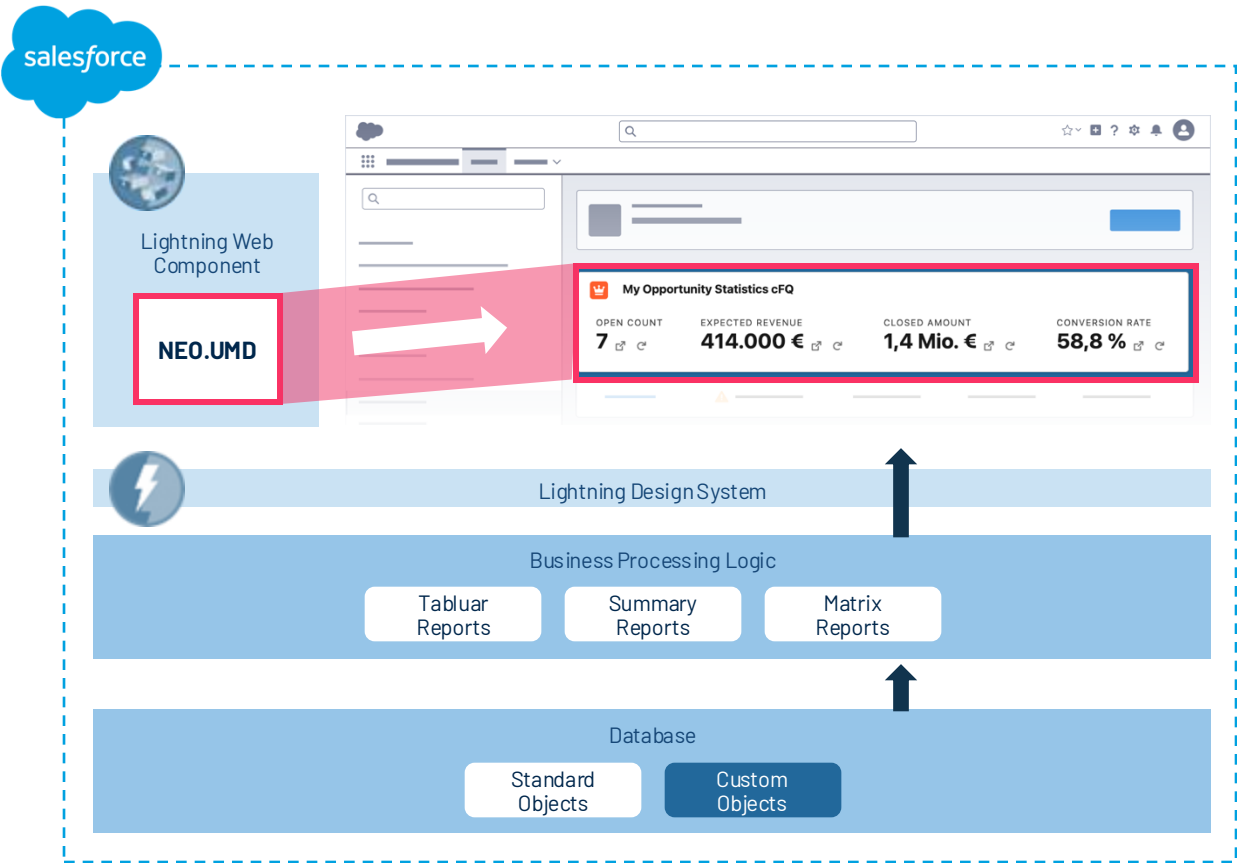
Uses shortcuts (e.g., "4.5M €") for better clarity and readability

High Flexibility

Allows multiple mini-dashboards on the same page.

Architecture and Integration of NEO.UMD in Salesforce

Scalable and certified architecture by Salesforce, exclusively available on the AppExchange.



UI/UX Design – Implemented based on the Salesforce Design System—stable and release-safe.

Reusability – NEO.UMD can be integrated into various locations within Salesforce and on each multiple times.

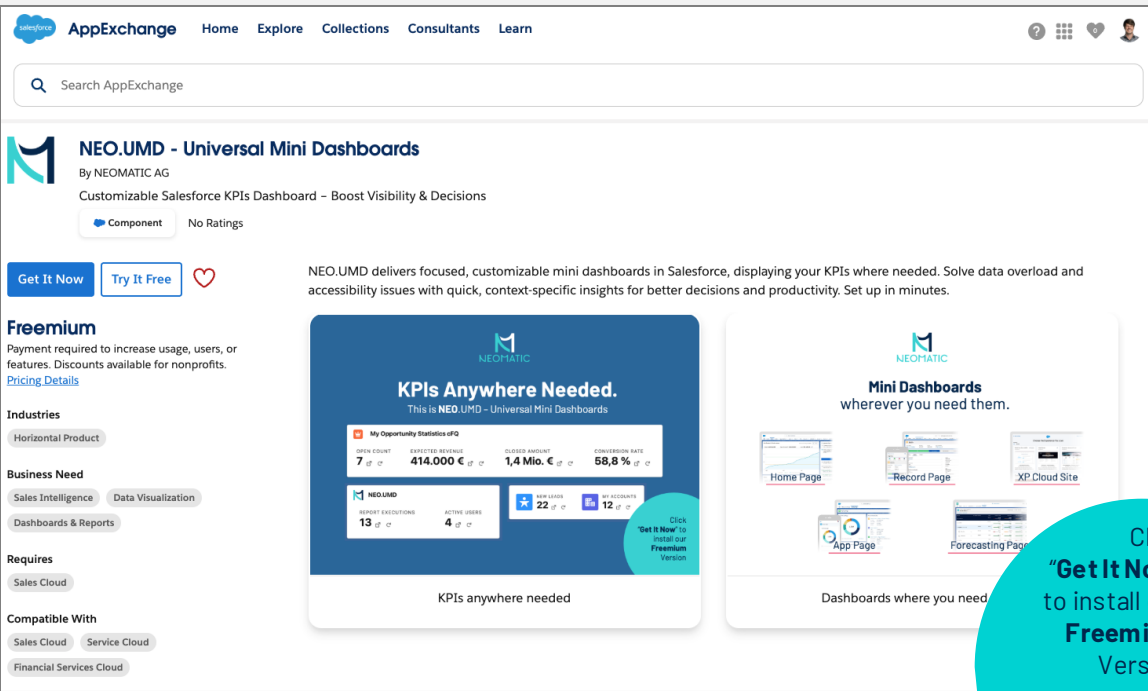
Customizations – New reports can be quickly created and used alongside existing ones in new mini-dashboards.

NEO.UMD Upgrades – We continuously develop our product to ensure ongoing improvements and enhancements.

Scalability – Our app works seamlessly in very large Salesforce orgs with extremely large datasets.

NEO.UMD is a certified Salesforce AppExchange App

AppExchange is the official Salesforce marketplace for apps, components, and consulting solutions.



- ✓ **Salesforce AppExchange Products**
- ✓ **Salesforce Security- and Quality Tested**
- ✓ **Release-Safe Managed Package**

The Salesforce AppExchange accelerates transformation and offers measurable advantages over custom development!



Quick and efficient implementation



3x annual innovation updates



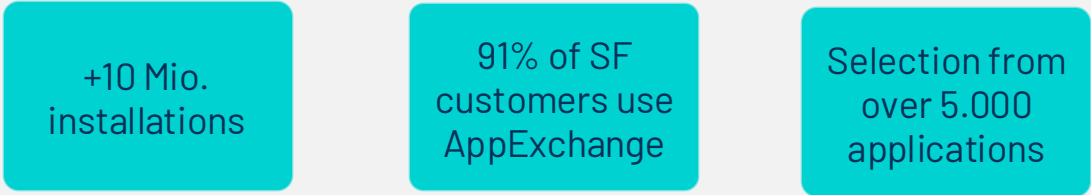
Up to 90% reduced aintenance effort (TCO)



Faster ROI

The Salesforce AppExchange accelerates transformation and offers measurable benefits for every Salesforce customer

- (1) Apps are equivalent to Salesforce standard for customers.
- (2) Extensions do not affect system limits.
- (3) No maintenance effort for app development.
- (4) 60-80% reduction in conceptualization and development time.
- (5) Test versions can be tried out in your own Salesforce environment.
- (6) Up to 3x innovation updates per year.



As a co-innovation partner, development and operating costs can be significantly reduced.



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