

Sales.Cloud® Service.Cloud® Pardot® App.Development Integration Apex

SERVICES OVERVIEW

WINTER 2018

Salesforce® Consulting Partner

WHAT WE DO

Peak360 IT is a Denver, CO based technology company and Salesforce® Consulting Partner. Our consultants have backgrounds in technology, software development, and are Salesforce® Certified consultants.

Our goal is to partner with our clients to understand their objectives and deliver on our commitments. We are committed to providing exceptional customer service, with emphasis on responsiveness and technical competency.

We continue to support small-mid size businesses and large enterprises throughout the U.S. and are a proud Pledge 1% member.



EXPERTISE

Sales Cloud®
Service Cloud®
Pardot®
App Development
Integration
Apex

CORE INDUSTRIES

Telecom
Media
Communications
Finance
Technology
High Tech

OVERVIEW



IMPLEMENTATION & INTEGRATION

With expertise in Salesforce



MANAGED SERVICES FOR SALESFORCE

On-going, on-demand support



APPLICATION DEVELOPMENT

Custom development & integration

QUICK FACTS

Peak360 IT was founded in 2014

We are a proud Pledge 1% member

Registered Salesforce Consulting Partner

Supporting customers throughout the U.S.

- ✓ Our Salesforce consultants are certified with at least 5 years experience
- ✓ Experienced consulting leadership
- ✓ Successful track record
- ✓ Proven methodology for project implementation and project control
- ✓ Technology Experts
- ✓ Industry Knowledge - we speak your language



Telecom



Media



Communications



Healthcare



Finance



High Tech

MANAGED SERVICES

FOR SALESFORCE®

Whether you are a small business using Salesforce out-of-the-box or a large enterprise with complex integrations, our Managed Services provide a cost effective way to get on-going, on-demand Salesforce administrative and development support.



Salesforce consulting at a flat, monthly rate



Forecast and manage your IT spend



Add additional hours as needed at a discounted rate



Development and administrative support



Leverage additional skillsets and training



No long term contracts, all plans are month to month



Regularly scheduled review meetings



Access certified Salesforce resources



Plans start at 10 hours/month @ \$1,750

MANAGED PROJECTS

Custom software development services on a wide range of technologies including Java, Weblogic, Mobile App Development (Android, iOS), and Big Data (Business Intelligence). What about Salesforce Apps? Of course we do.



IMPLEMENTATION

A highly iterative and agile implementation approach with emphasis on collaboration, feedback, and results.



INTEGRATION

Custom integrations via custom API (REST, SOAP, Bulk API) to Databases, applications, additional Salesforce orgs.



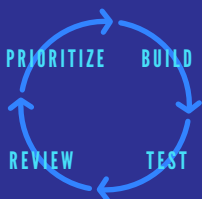
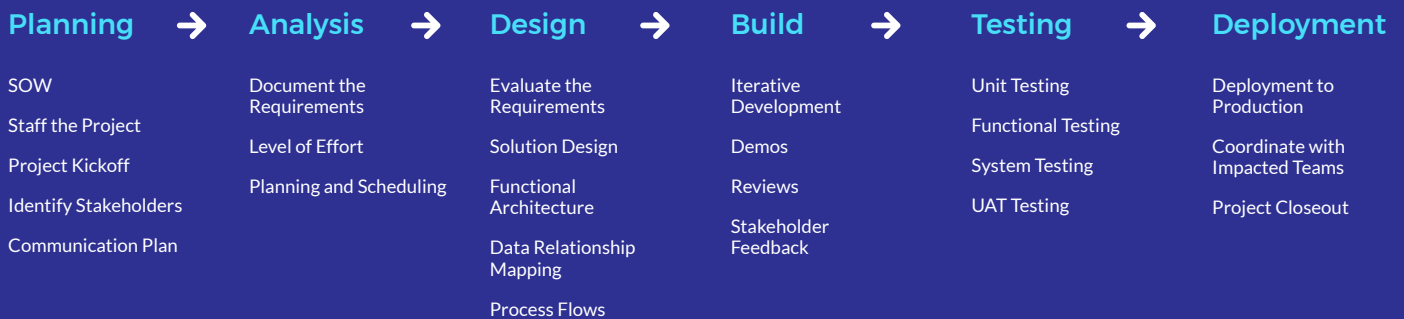
ENHANCEMENT

Automate business processes, build custom applications, unleash the power of mobile and lightning.

P360 IMPLEMENTATION

OUR PROCESS

P360 is our collaborative process that requires involvement between your team and ours. It begins with initial discovery that helps define our business process and needs. Next, the design phase provides you with visibility into the initial features being developed to allow you the opportunity to provide feedback and identify additional features or functionality that may be needed. Finally, we follow an iterative approach which incorporates your feedback and we wrap it up with a final review of the solution. Throughout the project, we provide weekly status to the project team, executive sponsors, and stakeholders which includes budget tracking, risks and issues, and any escalations that require attention.



Flexibility – Agile process with on-going client feedback and demos throughout the project

Client Engagement – Stakeholder input throughout the lifecycle of the project

Reviews – After each iteration to review status, budget, concerns, and schedule

Prioritize – Requirements are prioritized after each iteration

**CUSTOMER
SUCCESS STORIES**

CASE STUDY

Peak360 IT implements a custom account hierarchy and relationship mapping plugin for Oil & Gas customer.

CLOUD
Sales, Pardot

PROJECT TYPE
Custom

INDUSTRY
Media

PARTNER ROLE
Consulting Services

CHALLENGE

A large Oil & Gas company was struggling with the creation and maintenance of Account Hierarchy information, with >70% of their Contacts stored within Salesforce missing values in the Contact Object 'Reports-to' field. They wanted the ability to view and update Account Hierarchy information in an easy-to-use graphical user interface (UI).

SOLUTION

Peak360 IT implemented a custom UI solution that integrated seamlessly with the standard Salesforce Account and Contact Objects to provide the ability for Sales Managers to manage Account Hierarchy information, and provide insight for Executive Leadership to understand who their counterparts are within their Customer organizations.

RESULT

As a result of the Pardot integration, the Marketing Team was able to effectively send communications on behalf of the Relationship Owners -which increased the scoring on the campaigns due to the Influencers familiarity with the sender. The solution also improved customer service by providing the agents with the Pardot activity directly in Salesforce.

CASE STUDY

Peak360 IT integrates two Salesforce Platforms for a major Media and Communications provider.

CLOUD
Sales, Service

PROJECT TYPE
Custom, Integration

INDUSTRY
Media and Communications

PARTNER ROLE
Consulting Services

CHALLENGE

A major Media & Communications provider had multiple Salesforce® Orgs being used by different support groups within the company, each supporting a particular customer profile with different support needs. Over time, some customers were supported by both teams and there was overlap, and inconsistency in the customer data.

SOLUTION

Peak360 IT built a bi-directional interface between the two Salesforce® systems to keep the customer data in sync in each org, regardless of where the data was updated.

RESULT

As a result of the bi-directional interface, both support groups were able to use their support groups Salesforce Org, and completely eliminate the need to “swivel-chair” and manually update both systems.

CASE STUDY

Peak360 IT Salesforce Consultants convert Person Accounts to Business Accounts for a Telecom.

CLOUD
Sales, Service

PROJECT TYPE
Custom

INDUSTRY
Telecom

PARTNER ROLE
Consulting Services

CHALLENGE

A Telecom decided to use Salesforce® Person Accounts to manage their non-business accounts, and were impacted by certain limitations while trying to add additional capabilities to the system not currently supported with Person Accounts.

SOLUTION

Peak360 IT developed a script to convert the Person Accounts to Business Accounts, and designed a relational data model to ensure scalability of the platform based on the growing need for additional capabilities within the system.

RESULT

As a result of the account conversion to Business Accounts, additional enhancements were added to the system, including data, objects, workflows, and processes to support the growth of the company.

CASE STUDY

Peak360 IT Salesforce Consultants implements Pardot with Salesforce for marketing emails and campaigns to Influencers.

CLOUD
Sales, Pardot

PROJECT TYPE
Custom

INDUSTRY
Media

PARTNER ROLE
Consulting Services

CHALLENGE

A major media company needed a robust marketing and campaign management system to send targeted campaign emails to Influencers, and to track campaign effectiveness and scoring. They also had requirements that were not supported out-of-the-box with Pardot and required a custom solution.

SOLUTION

Peak360 IT developed and configured a custom interface between Salesforce and Pardot that automated the businesses processes to set the Pardot Assigned User and other custom fields to dynamically generate the emails based on the data in Salesforce. On the Influencer records in Salesforce, all Pardot email and campaign activity is visible with drill-down capability to open the emails and activity directly in Pardot from Salesforce, leveraging SSO capability.

RESULT

As a result of the Pardot integration, the Marketing Team was able to effectively send communications on behalf of the Relationship Owners -which increased the scoring on the campaigns due to the Influencers familiarity with the sender. The solution also improved customer service by providing the agents with the Pardot activity directly in Salesforce.



THANK YOU

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