

FastSlowMotion

Financial Services Expertise

Real-World Expertise + Salesforce Knowledge = Quick ROI
and Continued Success



Expertise Salesforce Guidance *for* Growing Businesses

- » Crawl-Walk-Run Approach
- » We Deliver Unexpected Wins
- » Financial Services Cloud Quickstart
\$12,500+



Expertise

40 certified individuals across 15
different license types.

Key FINS Sub-Verticals

Wealth Management, Lending,
Benefits Management, Insurance,
and Private Equity.



Cloud Specialties

Financial Services Cloud, Marketing Cloud,
Sales, Service, Pardot, Experience Cloud,
CPQ & FSL

Expertise in Integrating

Quickbooks Enterprise/Online, Orion
Connect, FICO, numerous ERP systems,
Conga Composer, DocuSign, Rollup
Helper, and Salesforce Maps



A Few of Our Clients



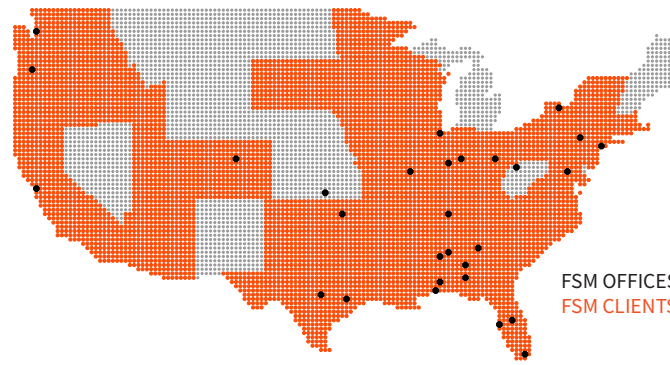
VULCAN
VALUE
PARTNERS



Flöify



RFG ADVISORY



FSM OFFICES NATIONWIDE & NEWCASTLE, UK
FSM CLIENTS IN 36 STATES

What to Expect *when* Working With Us

We Actually Care

You'll be hard pressed to find another company as actively and passionately invested in your success as we are. We serve only growth businesses, and our clients' best interests are always at the center of our focus. Helping businesses excel at what they do is just what we do.

We Ask Questions

We take time at the start of each project to be sure we have a deep understanding of your business. We want to know not only where you are, but where you want to be.

We Will Share Business Advice

Most clients don't work with anyone with C-level expertise. Is there another way to say this? Our team is rich with expertise across a wide range of businesses and industries.

Dedicated Project Leadership

Your direct point of contact throughout, available whenever you need them. Each project leader is supported by a team of Salesforce Certified Consultants and Solutions Architects.

Crawl-Walk-Run

If you're new to Salesforce, our QuickStart program is designed to build key projects and processes up front so you see immediate ROI and value. After that, we'll work alongside you as your trusted partner to streamline and automate the rest of your business, as you're ready for it.

We Build FAST

We use the Agile project management methodology to deliver quickly, involving you in the entire lifecycle: planning, building, testing, training, deployment, and change management. Every week, you'll see substantial progress.

We Over-Communicate

We set up a project in our online project management tool so you have full visibility into our efforts and seamless communication with our team. We'll hold meetings at least weekly, and will deliver written status reports as well. When we are ready to deploy, we'll produce custom training videos and host guided sessions on how to use your cool new tools.

We Deliver Unexpected Wins

On most occasions, when we get into a project, we help our clients get value from Salesforce in ways they were not expecting. We help you see what's possible.

We Consult Before We Configure

If we see poor processes or areas that can be improved, we call it out. Most partners are not consultants like us.

We Know How to Drive Adoption

Salesforce is useless if no one in your company wants to use it. That's why adoption is high on our priority list. Of course training is important, but adoption is at the top of our mind in every solution we develop. Is it easy? Intuitive? If not, we iterate until it is.

We Are Really Good at This

Not to sound cocky, but we're proud of our ability to consistently deliver "wow" experiences to our clients.

Industry Experience

Manufacturing • Financial Services • Healthcare • Services
Contracting • Construction • Consumer Packaged Goods

Salesforce Services

Sales Cloud Implementation • Service Cloud Implementation • CPQ Implementation • Field Service Lightning Implementation
Marketing Cloud Implementation • Salesforce "Health Checks" • Remediation and Turnarounds • Lightning Migration • Salesforce Consulting
Change Management and User Adoption Consulting • Custom Application Development on the Salesforce Platform
Salesforce Training and Mentoring • Ongoing Salesforce Support and Enhancements