



# Consulting

**FORVIS**

## Salesforce

Business Technology Solutions at **FORVIS** provides customer relationship management (CRM) and enterprise resource planning platform analysis, design, implementation, upgrade, training, and support services. As a Salesforce consulting partner, our experienced team of technology consultants can help you strengthen your CRM strategy, enhance business workflows, and advance your organization's digital transformation journey.

### Transform the Customer Experience & Improve the Entire Sales Process

Whatever your industry, Salesforce has innovative features that can help you modernize your business, save time, and drive revenue growth. [More than 150,000 companies\\*](#) across numerous industries use Salesforce to help improve business performance.

From [manufacturing](#) and [construction](#) to [healthcare](#) and more, the benefits of implementing a modern CRM system are vast. Explore how we can help you unlock business potential with Salesforce CRM applications for sales, customer service, marketing automation, e-commerce, and analytics.

**10+**  
Years Legacy  
Partnership

**150,000+**  
Customers of  
Every Size\*

**AI-powered**  
Insights to Drive  
Customer Experience



## Sales Cloud

Salesforce Sales Cloud includes a robust set of features to help you sell efficiently, capture key insights through AI-powered analytics, and streamline processes with automation. From lead and activity management to opportunity and pipeline management, we can help you connect activities and engagements to increased sales opportunities and shortened deal cycles.

## Service Cloud

Revitalize your approach to customer experience with Salesforce Service Cloud. From process enhancements and automation to AI-powered, self-service support and case management, we can help you centralize customer information and resolve cases faster.

## Marketing Cloud & Account Engagement

Improve marketing efficiency and customer engagement with Salesforce Marketing Cloud and Account Engagement (formerly Pardot). In today's fast-paced business landscape, harnessing the capabilities of cutting-edge marketing automation is not just advantageous but imperative. FORVIS professionals can help you use Marketing Cloud tools to build, manage, and personalize customer journeys.

## Experience Cloud

Elevate customer experiences with Salesforce Experience Cloud. Prioritizing customer experience is pivotal. FORVIS professionals can help you unify disparate datasets and build secure websites, portals, and apps to create a seamless digital experience for your customers.

## Health Cloud

Healthcare is one of the fastest-growing industries in the world. Salesforce Health Cloud can help improve outcomes and lower costs for healthcare and life sciences companies. With deep knowledge of the healthcare industry, FORVIS' professionals can help you advance data management, automate processes, and drive cross-team collaboration to streamline workflows and increase productivity.

## Nonprofit Cloud

With deep experience working with nonprofit organizations worldwide, our team can help you use Salesforce Nonprofit Cloud to scale fundraising and marketing campaigns and streamline program management and administrative processes.

## Salesforce Consulting Partner Services

Whether you already have the Salesforce platform in place or are just getting started, FORVIS can be your trusted Salesforce consulting partner and meet you wherever you are on your CRM journey.

FORVIS is a certified Salesforce partner. Our Salesforce technology consultants have decades of experience helping organizations review technology platforms, design systems to streamline processes, and achieve their goals through digital transformation.

We provide:

- Technology assessments
- Implementation services
- Integration services
- Salesforce release & upgrade support services
- Salesforce admin & user training & support services

Our dedicated Salesforce support team can help you manage:

- Everyday Salesforce challenges
- Troubleshooting errors
- System diagnostics
- Upgrades, enhancements, & new releases
- User adoption hurdles

Start your digital transformation today. Discover how we can help you review, implement, and modernize CRM software.

## Want to Know More?