

salesforce

# CONSULTING SERVICES

DRIVEN BY SUCCESS

2024

# DATASHEET



**Powered by Innovation, Driven by Expertise.**  
Salesforce Summit Consulting & Services Partner.

**5**  
COUNTRIES  
OFFICES

**15**  
YEARS IN  
BUSINESS

**400+**  
CERTIFICATES  
SALESFORCE

**500+**  
INTEGRATIONS  
SALESFORCE

**1.7K+**  
COMPLETED  
PROJECTS

**salesforce**  
**CONSULTING  
SERVICES**

1. IMPLEMENTATION SERVICES
2. OPTIMIZATION SERVICES
3. INTEGRATION SERVICES
3. CLOUD SERVICES
4. STAFFING SERVICES
5. MANAGED SERVICES

**INDUSTRY EXPERTISE**

**Banking**

- ✔ Small & Mid-Size Banks
- ✔ Credit Unions
- ✔ Mortgage & Lending
- ✔ Wealth Management

**Insurance**

- ✔ Property Insurance
- ✔ Vehicle Warranty
- ✔ Medicare

**PRODUCT EXPERTISE**

- ✔ Financial Service Cloud
- ✔ Sales Cloud
- ✔ Service Cloud
- ✔ Experience Cloud
- ✔ Marketing Cloud
- ✔ CPQ
- ✔ Einstein / AI
- ✔ Tableau
- ✔ Mulesoft
- ✔ Commerce Cloud

**NICHE SPECIALTIES**

- ✔ Contact Centers
- ✔ CTI
- ✔ Core Systems Integration
- ✔ Mergers & Acquisition (M&A)
- ✔ Loan/Mortgage
- ✔ Applications
- ✔ Client Retention/Xell/Upsell
- ✔ Payment Processing
- ✔ Commission Calculation
- ✔ Legacy System Replacement



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