

The logo features the word "shellblack" in a white, lowercase, sans-serif font, centered on a dark gray diagonal bar. This bar is set against a background of concentric circles in varying shades of gray, with a thick dark gray outer ring and a lighter gray inner ring. The text is positioned between the two rings.

shellblack



Maximize
Your Salesforce[®]
Investment.



Your Trusted Salesforce Partner

ShellBlack is a proven and trusted Salesforce partner with a select focus on the financial services industry. Our certified consultants are experts in the implementation and configuration of Salesforce, providing customized solutions to streamline the way you market your brand, sell your products and services, and support your customers. We drive customer success with Salesforce by focusing on business processes, data insights, usability, and adoption.

Experts in Salesforce

Succeed With a Certified Partner
to Lead The Way

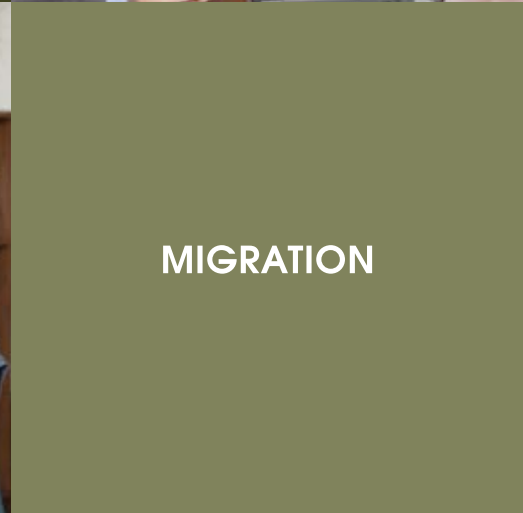
ShellBlack's tenured professionals deliver targeted services to help financial services clients succeed with Salesforce — from implementations to custom development and complex data migrations.



**MARKETING
AUTOMATION**



IMPLEMENTATION



MIGRATION



**CUSTOM
DEVELOPMENT**



Our Services



FINANCIAL
SERVICES CLOUD



SALES
CLOUD



MARKETING
CLOUD



SERVICE
CLOUD



EXPERIENCE
CLOUD



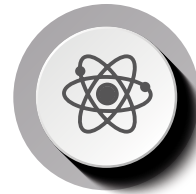
TABLEAU



INTEGRATIONS



PARDOT
(MCAE)



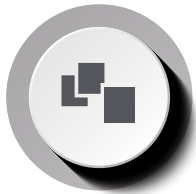
EINSTEIN AI



SHIELD



QUICKSTART
IMPLEMENTATIONS



DATA
MIGRATIONS



MERGING
SALESFORCE CRMS



USER
TRAINING



CUSTOM
DEVELOPMENT

Customized Solutions for Financial Services



ACCELERATORS

- ✓ Saves time and increases adoption
- ✓ Keeps development costs low
- ✓ Solves common industry challenges



Financial Services Leadership

ShellBlack doesn't just know Salesforce — we also know the details and nuances of using these powerful solutions to fuel momentum in the financial services arena specifically. In fact, 95% of our Salesforce engagements are rooted in this dynamic industry. For financial services clients looking to generate leads, re-engage existing clients or tackle complex business logic, our industry knowledge can help move projects forward with efficiency and precision.



**Insurance
& Benefits**



**Wealth
Management**



**Mortgage
& Lending**



**Capital & Asset
Management**



**Banks &
Credit Unions**



**Additional
Financial Services**

2200+

PROJECTS

200+

CERTIFICATIONS

95%

FINSERV CLIENTS



Focused on Wealth

Experience by the Numbers

With years of customer relationship management (CRM) experience in the highly competitive wealth management space, ShellBlack supports bottom-line results through top-tier customer experiences.

We've worked with

360+ wealth firms

- 200+ wealth firm clients
- 160+ through M&A activity

100,000+

project hours delivered
for our wealth clients

From Startups to
Barron's Top 100

35% of Barron's Top 20 RIAs
are ShellBlack Clients



Published
wealth eBook



CRM leader on the
**Kitces Financial AdvisorTech
Solutions Map**

A grayscale photograph of three business professionals in a meeting. A woman with short dark hair is seated on the left, smiling and looking towards the center. A woman with long dark hair is standing in the center, looking towards the right. A man with glasses is seated on the right, looking towards the center. They are all dressed in business attire. The background is a modern office setting with a white wall and a dark shelf.

Smooth Transitions for Mergers & Acquisitions

With hundreds of M&A-focused wealth engagements to our credit, ShellBlack works as a seamless extension of your transition team to take data migration, change management, and CRM onboarding off your punch list.



Migration Success With Key Platforms



JUNXURE



MS DYNAMICS



REDTAIL



SALESFORCE



TAMARAC

Certified Training to Gain Buy-In

Our certified Salesforce instructors have years of experience with this critical, and often overlooked, element of change management.



Who We Are

Our leadership team has been working with Salesforce since its early days — whether tapping into benefits as customers, selling professional services, or delivering comprehensive customer relationship management (CRM) solutions. We combine our passion for Salesforce with the business acumen and expertise we've cultivated over the decades.

At ShellBlack, we're Salesforce fans who love what we do!

Core Values

Customer Success

We empower our clients through innovative thinking, technical expertise, and determination.

One Team

A diverse, respectful, and enthusiastic group that holds ourselves accountable and actively supports and listens to each other.

ShellBlazers

We are curious tinkerers and learners who are passionate about and actively contribute to the Salesforce community.



shellblack.com

