



Fortimize is a team-owned consulting firm dedicated to delivering Salesforce and Data & Analytics solutions tailored for the Financial Services industry.

OUR PURPOSE IS TO BE WILDLY SUCCESSFUL SO WE CAN BE RADICALLY GENEROUS

Fortimize Capabilities

ADVISORY

We define technology and data strategies alongside roadmap planning and project execution.

SALESFORCE

We create industry-focused solutions that improve operations and streamline workflows.

DATA & ANALYTICS

We develop data integrations, create data warehouses, and provide insightful reporting.

How We Can Help

Through flexible resource models, we help you implement, scale, and support end-to-end business solutions powered by Salesforce, data and analytics, and integrated industry applications. Our services include:

IMPLEMENTATION

We focus on your people and processes to build custom industry solutions, with a fixed scope. Projects are delivered using an agile methodology.

MANAGED CAPACITY

We enhance your solution throughout a strategic long-term engagement. As your business priorities shift, so does your team's focus.

SUPPORT

We address your business needs with a ticketing system, assigning available team members, and providing a designated allocation of hours.

Strategic Partnerships

Our collaborations with leading technology and consulting firms position you for success. This list excludes the standard technologies we regularly use for customer solutions.



Sample Business Solutions



REAL ESTATE

Acquisitions / Dispositions
 Fundraising
 Investor Relations
 Leasing
 Service Requests



PRIVATE EQUITY

Pipeline Management
 Fundraising
 Investor Portal
 Onboarding
 Document Management



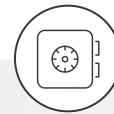
ASSET MANAGEMENT

Client 360
 Digital Onboarding
 Appointment Scheduler
 Portfolio Reporting
 Advisor & Investor Portals



BANKING & LENDING

Retail Sales
 Referrals
 Case Management
 Commercial Sales
 Loan Application



INSURANCE

Distribution Management
 Customer / Agent Portals
 Workflow Automation
 Call / Service Center Strategy
 Cloud Migration Strategy

Customer Success

Our commitment to delivery excellence goes beyond a tagline; it reflects our dedication to helping customers achieve real business outcomes. Since 2012, we've completed over 1,000 customer projects and consistently maintained an average customer satisfaction score of 4.9 out of 5.0.

