# SQIX™

# Engineering Smarter Systems

# Introduction

- Started in 2022 with 2 members and 1 project

- Been in the consulting industry for over 8 years

- Industry experience for over 10 years

- Currently, 12 **certified professionals (onsite & offshore)** skilled and experienced in Salesforce solutions

- Currently, we are working on 2 projects and 1 systems support

## Core Values

› Innovation, passion, and collaboration drive us.

› Provide top-notch Salesforce consulting

› Lifelong learner

## Our Commitment

We are here for you, helping you succeed & grow by offering expert Salesforce guidance, tailored to your unique business needs.

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# Areas of work

**1** Proficient in Sales, Service, Net Zero, Health, Marketing, Education, Experience cloud

**2** Project Implementation

**3** Salesforce Setup and Configuration
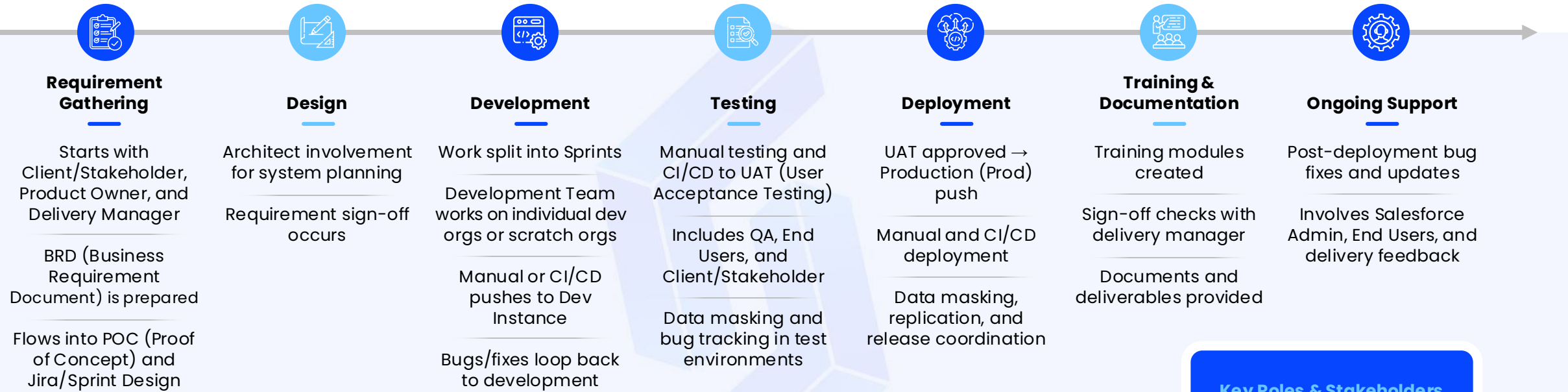
**4** Salesforce Customization

**5** Specialized in delivering tailored Salesforce solutions that enhance business efficiency and scalability

**6** Integration using middleware/custom integration

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# SQIX Project Lifecycle Flowchart

### Requirement Gathering

Starts with Client/Stakeholder, Product Owner, and Delivery Manager

BRD (Business Requirement Document) is prepared

Flows into POC (Proof of Concept) and Jira/Sprint Design

### Design

Architect involvement for system planning

Requirement sign-off occurs

### Development

Work split into Sprints

Development Team works on individual dev orgs or scratch orgs

Manual or CI/CD pushes to Dev Instance

Bugs/fixes loop back to development

### Testing

Manual testing and CI/CD to UAT (User Acceptance Testing)

Includes QA, End Users, and Client/Stakeholder

Data masking and bug tracking in test environments

### Deployment

UAT approved → Production (Prod) push

Manual and CI/CD deployment

Data masking, replication, and release coordination

### Training & Documentation

Training modules created

Sign-off checks with delivery manager

Documents and deliverables provided

### Ongoing Support

Post-deployment bug fixes and updates

Involves Salesforce Admin, End Users, and delivery feedback

## Highlights

› Integrates agile practices (Sprints, Jira, Scrum roles)
› Tracks manual and CI/CD deployments
› Shows data masking in non-prod environments
› Includes QA, documentation, training, and user provisioning
› Visualizes the interplay between teams across phases

## Why it's useful

**This flowchart is ideal for**

› Presenting your Salesforce delivery methodology to clients
› Training new consultants or developers
› Including in project proposals or pitch decks to showcase rigor

Would you like this simplified into a client-facing version or converted to a branded infographic?

### Key Roles & Stakeholders

› Client/Stakeholder
› Architect/PO/Lead
› Developer/Scrum
› Offshore/Other Teams

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# Our Case Studies

Work with one of the **biggest healthcare clients** in New York

Comprehensive Underwriting Application for a Mortgage Company enhancing loan assessment process

Engineered a tailored payment integration solution, following the failure of the Stripe connector

Spearheaded the initial implementation of NetZero cloud technology in the hospitality sector, promoting sustainable practices and energy efficiency

Designed and launched a user-friendly, custom booking application for public use, streamlining reservation processes, scheduler and calendar across various web services

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# How Can We Help You?

## Business Strategy & CRM Launch

› CRM setup for startups (Sales, Service, Marketing Clouds)
› Lead/case automation, scalable object models
› KPI dashboards, campaign tracking
› Workflow design aligned to business goals
› Persona-based user/role strategy

## Custom Development & Application Engineering

› Build Lightning Web Components, Apex, Flows
› Custom Salesforce apps with security controls
› Optimize workflows, approvals, validations
› Create AI dashboards with Heroku/Microsoft
› UI/UX customization for better adoption

## Operational Excellence & Implementation

› Full Salesforce setup & CI/CD pipelines
› End-to-end deployment & admin support
› Streamline complex processes
› Automate provisioning/deprovisioning
› Improve efficiency with flow-based logic

## Infrastructure & Managed Services

› Configure roles, org defaults, and security
› Ongoing support: health checks, fixes, user management
› Monitor API usage, storage, performance
› Migrate legacy systems with data cleanup and validation

## Data, Integration & Enablement

› Build Salesforce dashboards, reports, and KPI trackers
› Enable ERP, marketing, and support tool integration via middleware (MuleSoft, Zapier, Informatica)
› Email/calendar sync (Gmail, Outlook)
› Write custom integration logic using Apex request/response classes
› Work with SOAP (WSDL) & REST APIs for bi-directional sync
› Support complex auth flows (OAuth, JWT, Named Credentials)
› Deliver training, onboarding paths, and Trailhead tracks

## User-Centric Design

› Design role-specific Lightning UIs
› Personalized dashboards and layouts
› Improve UX and user adoption through intuitive design

## Cutting-Edge AI Integration

› Einstein GPT for automation and error detection
› AgentForce: AI chat/scheduler tools
› Predictive analytics for decisions & forecasting
› Enable GenAI-driven customer interactions

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# Why us?

**PRECISION** ──── **INNOVATION** ──── **SUCCESS**

**Certified Excellence**

**12+** **Experienced Professionals**
12+ years in the industry

Deep Understanding

CRM Strategy

Business Goals

Technical Execution

Your Success, Our Priority

Our team is dedicated to empowering you with the tools and expertise needed to succeed and scale in today's dynamic business environment

We are here for you, helping you succeed and grow by offering expert Salesforce guidance, tailored to your unique business needs

Personalized focus

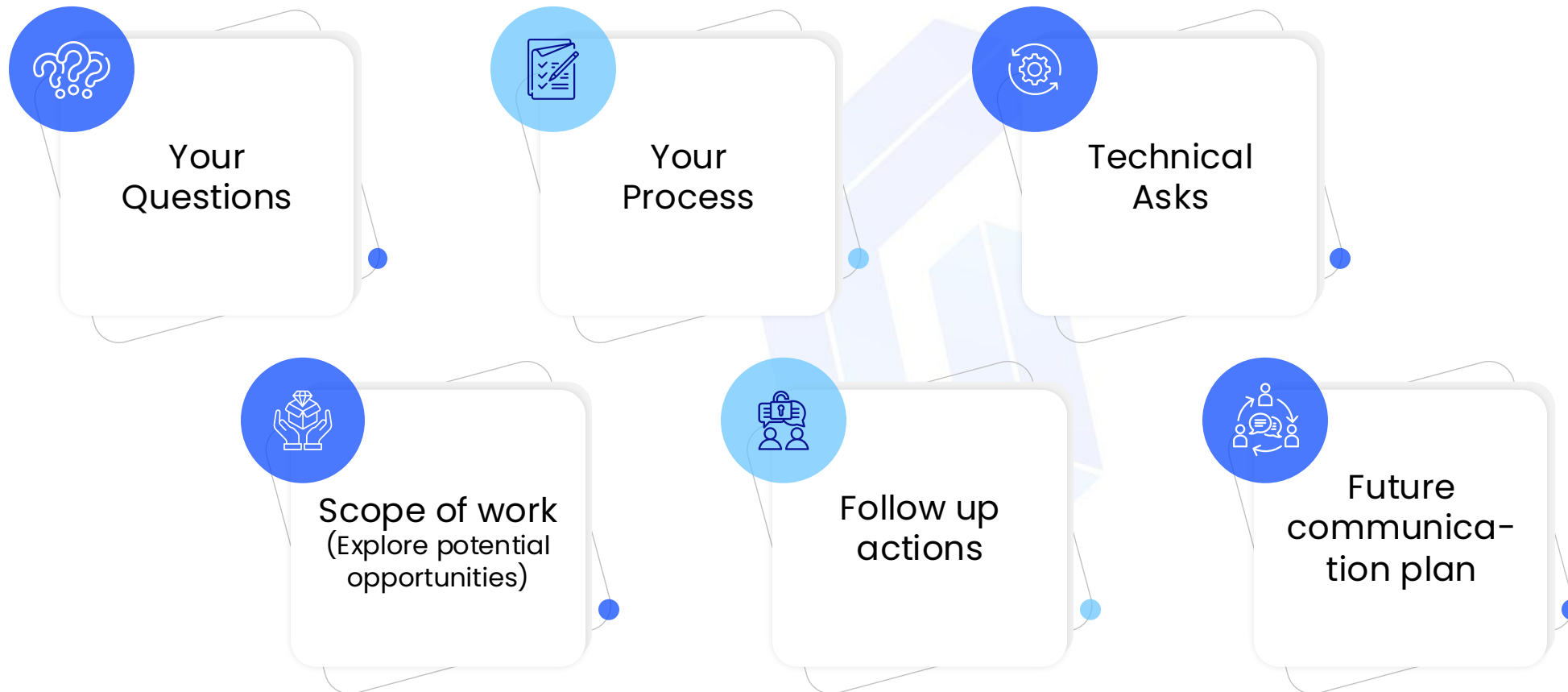Committed assistance & Dedicated support member (if required)

Daily scrum update

In-person visits / meetings

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# Let's Discuss

**Your Questions**

**Your Process**

**Technical Asks**

**Scope of work**
(Explore potential opportunities)

**Follow up actions**

**Future communica-tion plan**

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# SQIX™

Schedule a call with us **HERE** for a tailored solution.

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