CloudSage Consultancy Inc.

Salesforce Project Highlights

Capital Markets (Big5 Canadian Bank)

Challenge:
The client’s Direct Investing and Asset Management teams required better alignment between Salesforce Financial Services Cloud (FSC) and their institutional relationship workflows. The existing setup lacked visibility into household structures, mandates, and client onboarding statuses.

Solution:
I enhanced and extended the FSC data model to support institutional and HNW client needs:

- Customized **Financial Accounts, Goals, Holdings, and Rollups**
- Built out **Relationship Groups** and **Account Teams** to reflect real-world coverage models
- Implemented **Action Plans** for advisor onboarding workflows and compliance reviews
- Integrated Salesforce with internal systems using **REST APIs and Named Credentials**
- Created CRMA dashboards to track onboarding timelines and AUM by advisor coverage

Result:

- Improved relationship visibility for over 5,000 client records
- Reduced onboarding cycle time by 30%
- Enhanced regulatory reporting readiness and advisor efficiency

---

Media & Ad Sales (Largest Media Company in Canada)

Challenge:
The Salesforce instance supporting media sales, legal, and finance at the client’s organization was underutilized, with slow feature delivery cycles, fragmented automation, and manual processes affecting deal velocity.

Solution:
As Product Owner and Senior Developer, I led efforts to modernize and streamline the platform:

- Scaled feature delivery from **3 to 14 releases per year**

- Rebuilt and consolidated automation using **Flows and CRMA dashboards**
- Automated **legal approval workflows**, integrating DocuSign and internal systems
- Integrated on-prem data via **NodeJS and secure EFT** into Salesforce
- Implemented DevOps using **Copado + Git**, improving CI/CD practices

Result:

- 20% reduction in deal turnaround time
- 4x increase in release cadence
- Improved visibility into legal pipeline and campaign rollouts

---

Nonprofit Org Setup and Implementation

Challenge:
The client, focused on supporting Black farmers, had no CRM to track donors, farmers, and project partners. Manual email and spreadsheet workflows caused duplicate efforts and poor contact visibility.

Solution:
I led a full-cycle **Nonprofit Cloud (NPSP)** implementation, including:

- Custom object model for **Farmers, Landowners, Funders, and Partners**
- Migration of contact data from spreadsheets into Salesforce
- Web-to-lead integration with **WordPress**
- Mailchimp connection for campaign automation
- Designed reports/dashboards and delivered live training + full documentation

Result:

- Centralized CRM adopted by core team
- Improved stakeholder communication and fundraising readiness
- Established foundation for future automation and impact reporting

---

Nonprofit Digital Transformation

Challenge:
My client tracked over 2,000 relationships manually across Google Sheets, Mailchimp, and Gmail. No CRM existed to manage their donors, farmers, and funders in a scalable way.

Solution:
Designed a phased Salesforce Nonprofit Cloud (NPSP) solution:

- Custom schema for **Farmers, Funders, Partners**
- Automated intake via **web-to-lead** from WordPress
- Gmail logging and Mailchimp sync setup

- Created reports and dashboards for board reporting
- Delivered full **training + hand-off docs** to enable self-sufficiency

Result:

- Centralized relationship tracking
- Improved visibility and follow-up with partners
- Established foundation for future grant/fundraising workflows

---

Salesforce CPQ Optimization

Challenge:
Sales teams for my telecom client struggled with a complex quote process for bundled media products, leading to errors, delays, and a heavy deal desk workload.

Solution:
Optimized the existing **Salesforce CPQ setup**, including:

- Rationalized product catalog and restructured bundles
- Created **price rules, product rules, and guided selling flows**
- Automated approvals based on deal thresholds
- Improved quote templates for clarity and compliance

Result:

- 30% faster quote turnaround
- 60% fewer deal desk escalations
- Increased quote accuracy and rep adoption