



# EFG & ALL TECH

*A complete solution for your business!*

## CHALLENGES

EFG managed hundreds of advisors nationwide across multiple business lines — pension planning (Modalidad 40), solar energy, insurance, AFORE, and investments. Their sales operations were fragmented: each team worked with disconnected tools, manual processes, and no unified visibility of performance or revenue by region or advisor. They needed a centralized CRM solution that could bring together every business unit, track team productivity, automate quoting and contracts, and support a scalable, data-driven growth strategy.

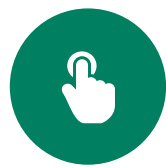
## SOLUTIONS



PENSION  
PLANNING



MEXICO



Professional  
Service



Information  
Technology



Accounting  
Management

## BENEFITS

1

### Empowered Advisors, Stronger Clients

Advisors sell more efficiently with instant tools and insights, delivering better client experiences and higher conversion rates.

2

### Centralized Control, Higher Profits

All operations now live in Salesforce — one system for every sale, client, and region. Leadership gains full visibility to make faster, more profitable decisions.

3

### Fully Digital Sales Cycle

From lead to NDA and financial projection, everything is automated in Salesforce. Less admin, more time for closing deals.

