SOURCE TRADE

Digital Transformation Consulting

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- Sales KPIs Dashboard
- Deal Movement Tracking
- Follow Up Reminders
- Funnel Stage Accounts
- Quotas Settings & Forecast Submissions
- Territory Management
- Agent Behavior Tracking
- Marketing Campaign Integrations & ROI
- Conference Mapping & Conferences ROI
- Commissions Calculation
- Website Visitors Visibility

Quick Wins We Can Provide Within Days

TWe can establish end-to-end sales visibility through customized KPIs, dashboards, and reporting for pipeline health, rep performance, and customer metrics, while implementing quota tracking, forecast submissions, and role-based commission calculations to drive accountability and transparency across the sales organization.

Implementation will include automated deal movement tracking, stage-based workflows, follow-up task automation, and agent behavior analysis to optimize the sales funnel, improve adoption, and enable data-driven decision-making through account funnel stage mapping (Above, In, and Below funnel) with corresponding automation triggers.

The solution can integrate marketing channels (Google Ads), enable website visitor tracking with behavioral scoring, implement conference ROI tracking with custom data capture capabilities, and establish campaign attribution reporting to provide complete visibility into lead sources, marketing effectiveness, and revenue impact across all customer touchpoints.

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Company at Glance

We are a specialized consulting firm dedicated to helping businesses unlock their full potential through strategic Salesforce implementations and digital transformation. Our team combines technical expertise with industry knowledge to deliver solutions that drive measurable growth and operational efficiency.

Since our founding, we've built a reputation for excellence by putting client success at the center of everything we do. Our proven track record across multiple industries and hundreds of successful projects demonstrates our commitment to delivering results that matter. We don't just implement technology—we partner with you to achieve your business goals.

Certified Salesforce Consultant

Our Certified Salesforce Consultants bring verified expertise in leveraging the platform to drive business growth. This certification ensures clients receive strategic guidance based on proven best practices and the latest Salesforce capabilities.

15+ Years of Experience

With over 15 years in the industry, our team has refined proven methodologies and developed deep insights that deliver results. This extensive experience enables us to anticipate challenges, implement effective solutions, and guide clients toward sustainable growth.

150+ Projects Implemented

Having successfully delivered over 150 projects, we bring tested expertise to every engagement. This track record demonstrates our ability to execute complex implementations, navigate diverse business challenges, and consistently deliver measurable results for our clients.

10+ Industries Served

Our experience spans over 10 industries, giving us a unique perspective on cross-sector best practices and strategies. This diverse exposure enables us to bring innovative solutions tailored to your specific industry while leveraging proven approaches from other sectors.

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70% of digital initiatives fail to meet or exceed their expected business outcomes

Source: McKinsey Quarterly, January 2018

Wishlist

We create a comprehensive wishlist by gathering your goals, pain points, and desired outcomes. This discovery phase ensures we fully understand what success looks like for your organization and establishes a clear roadmap that keeps the project aligned with your vision.

Roadmap

We develop a detailed roadmap that outlines the project timeline, key milestones, and deliverables. This strategic plan breaks down the implementation into manageable phases, ensuring transparency and accountability at every stage while allowing flexibility to adapt as priorities evolve.

Implementation

We execute the roadmap with precision, leveraging our expertise to bring your vision to life. Our hands-on approach ensures seamless integration, thorough testing, and continuous collaboration to address challenges and maintain momentum throughout the process.

Ongoing Support

We remain your trusted partner beyond implementation, providing continuous support to optimize performance and address evolving needs. Our team ensures you maximize your investment through regular check-ins, troubleshooting assistance, and strategic recommendations that drive long-term success.

How We Operate

We begin every engagement with a deep discovery process to understand your unique business challenges and goals. Our collaborative approach ensures tailored solutions that integrate seamlessly with your existing operations, with transparent communication at every step.

Our methodology combines strategic planning with agile execution, delivering results quickly while remaining flexible to your evolving needs. We prioritize knowledge transfer throughout, empowering your team for long-term success and providing ongoing support to ensure continuous improvement.

Feature	Source Trade
No System Health Check Charges	☑
Complimentary Solution Research	☑
No Minimum Project Hours	☑
Fixed Estimated Hours	☑
Unlimited Revisions	☑
Senior Team Members Only	☑
Full Team, One Price	☑
Industry-Specific Playbooks	☑
AI-Powered Consulting Layer	☑
Documentation & Training Assets	☑

Source Trade Features

See how our services stack up against the competition. This highlights the key capabilities, support levels, and value-added features that set us apart and demonstrate why we're the right partner for your business.

What does the future of your technology look like?

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Let's get started.