

BANKING AT-A-GLANCE

YOUR CONSULTING
PARTNER

WHO WE ARE

Sikich is a Gold level Salesforce.com Consulting and Implementation Partner headquartered in Naperville, IL with 19 offices through out the United States. Sikich completes over 250,000 consulting hours per year and has served over 7,900 clients over the past 32 years. At Sikich, we believe collaboration and communication are key to a successful Salesforce project. Our consultants are not only highly trained Salesforce experts, they are excellent business consultants facilitating open communication and incorporating feedback from everyone involved in the business. We know every project is unique, and we pride ourselves in the individual attention we give to our clients.



WHAT WE DO

We create enterprise value across your entire organization by providing end-to-end solutions focused on improving business performance. Ultimately, the combination of Salesforce expertise and collaboration results in a successful customized solution to address any business challenge.



CUSTOM
IMPLEMENTATION



SALESFORCE
EXPANSION



SALESFORCE
OPTIMIZATION



ONGOING ROADMAP
& SERVICE REVIEWS



LIGHTNING
CONSULTING
(CONVERSIONS)



QUICKSTARTS

- Over 450 Salesforce implementations for RIAs
- We build a long-term strategy/Salesforce roadmap for our clients
- Build two Insurance Agency Apps on Salesforce Platform
- Providing expertise and best practices in the Financial Services market
- Built a cost-effective Core Banking batch Integration engine
- Significant experience in deploying the Financial Services Cloud

WHY SIKICH?

- Sikich has over 12 years of Salesforce consulting and implementation experience spanning across several industries from manufacturing to financial services (Wealth Management, Banking, Insurance, Private Equity, Investment Banking) to technology.
- Beyond the typical Technology firm, Sikich offers a diverse portfolio of professional services (including accounting, audit and assurance, tax and advisory) uniquely designed to address your business's challenges and opportunities.
- With 35 years in business and 20 offices across the United States, we have a team of over 750 people that have helped thousands of clients meet every need that arises in their business.
- When you work with Sikich you not only get a seasoned Salesforce implementer, you get the strategic edge with access to end to end business and technology consulting experts.
- Sikich goes into every implementation with an approach centered around your needs, budget and goals.
- We don't just do Salesforce, we have experience integrating Salesforce with Microsoft Dynamics & Oracle NetSuite ERP solutions
- We incorporate your people, your processes, reduce risk and help you put together a successful strategic plan for digital transformation
- We are a Salesforce Gold Partner.
- With more than 2,750 projects under our belt, we've helped over 1,000 Salesforce clients transform their business, and we can help you too!



BANKING AT-A-GLANCE

KEY PRODUCT & INDUSTRY SUCCESS

BANKING ACCELERATOR FOR FSC AND SALES CLOUD

Solution: Based on past client need, Sikich has created a package of pre-built functionality that will allow banks to track all of the incentives owed to various employees that provide referrals. In addition to tracking the referrals, our Dashboard design allows this to be updated to show the different payouts by referral type by person.

CORE BANKING INTEGRATION FRAMEWORK

Solution: Due to the challenges associated with migrating Core Banking system data into Salesforce, we developed an Integration Framework that can streamline the amount of time it takes to consolidate your banking data before it is loaded into Salesforce.com. We evaluated many options on how to process 20+ files nightly and our framework allows you to define your business rules so that we can consolidate your various files before the nightly load.

STATE STREET BANK

Sales Cloud, Service Cloud, Communities

Solution: State Street turned to Sikich to help them streamline many of their current issues with Salesforce. We are backing out a lot of the unnecessary fields, page layouts, objects and custom code, getting State Street back to a more configuration oriented environment. We have been working very closely with many departments to ensure our work does not affect users. We also implemented a Customer Community that is used by thousands of customers to submit client issues.

VERVE, A CREDIT UNION

Sales Cloud, Service Cloud

Solution: a implemented Verve's sales team to allow for better tracking of all leads, sales opportunities and commissions. We brought data in from CU Answers, their Core banking system, on a nightly basis to ensure that the Verve team had up to date information on all of their members. The Service team is able to work on any client issue while having a complete picture of the member's information.

**SALESFORCE
CERTIFIED**

ADMINISTRATOR

ADVANCED
ADMINISTRATOR

APPLICATION ARCHITECT

COMMUNITY CLOUD
CONSULTANT

DATA ARCHITECTURE
AND MANAGEMENT
DESIGNER

DEVELOPMENT
LIFECYCLE AND
DEPLOYMENT DESIGNER

EDUCATION

NONPROFIT CLOUD
CONSULTANT

PARDOT CONSULTANT

PARDOT SPECIALIST

PLATFORM APP BUILDER

PLATFORM DEVELOPER I

SALES CLOUD
CONSULTANT

SERVICE CLOUD
CONSULTANT

SHARING AND VISIBILITY
DESIGNER

Sikich practices in an alternative practice structure in accordance with the AICPA Professional Code of Conduct and applicable law, regulations, and professional standards. Sikich CPA LLC is a licensed CPA firm that provides audit and attest services to its clients, and Sikich LLC and its subsidiaries provide tax and business advisory services to its clients. Sikich CPA LLC has a contractual arrangement with Sikich LLC under which Sikich LLC supports Sikich CPA LLC's performance of its professional services. Sikich LLC and its subsidiaries are not licensed CPA firms.

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