

The logo features the word "shellblack" in a white, lowercase, sans-serif font. The text is positioned diagonally across a dark gray, semi-transparent rectangular band. This band is set against a background of concentric circles in varying shades of gray, creating a layered, circular effect.

shellblack



Maximize
Your Salesforce®
Investment.



Your Trusted Salesforce Partner

ShellBlack is a proven and trusted Salesforce partner with a select focus on the financial services industry. Our certified consultants are experts in the implementation and configuration of Salesforce, providing customized solutions to streamline the way you market your brand, sell your products and services, and support your customers. We drive customer success with Salesforce by focusing on business processes, data insights, usability, and adoption.

Grow and Scale with Salesforce

ShellBlack Supports Your Strategy

From new Salesforce implementations to end-user training that drives adoption, ShellBlack's tenured professionals help clients seize — and create — valuable opportunities in the financial space.

**ANALYTICS TO
TRACK KPIs**

**AI AS A FORCE
MULTIPLIER**

**TOOLS FOR
ORGANIC GROWTH**

**AUTOMATIONS FOR
EFFICIENCY**

**THIRD-PARTY APP
INTEGRATION**

**M&A DATA
MIGRATIONS**

**CUSTOM
DEVELOPMENT**

**STRATEGIC ADVISORY
SERVICES**



Our Services



FINANCIAL
SERVICES CLOUD



SALES
CLOUD



MARKETING
CLOUD



SERVICE
CLOUD



EXPERIENCE
CLOUD



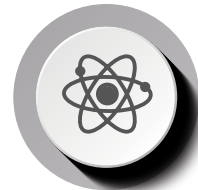
TABLEAU



INTEGRATIONS



PARDOT
(MCAE)



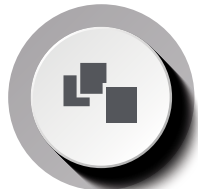
AGENTFORCE & AI



SHIELD



QUICKSTART
IMPLEMENTATIONS



DATA
MIGRATIONS



MERGING
SALESFORCE CRMS



USER
TRAINING



CUSTOM
DEVELOPMENT

Customized Solutions for Financial Services



ACCELERATORS

- ✓ Saves time and increases adoption
- ✓ Keeps development costs low
- ✓ Solves common industry challenges

Financial Services Leadership

ShellBlack doesn't just know Salesforce — we also know the details and nuances of using these powerful solutions to fuel momentum in the financial services arena specifically. In fact, 95% of our Salesforce engagements are rooted in this dynamic industry. For financial services clients looking to generate leads, re-engage existing clients or tackle complex business logic, our industry knowledge can help move projects forward with efficiency and precision.



Insurance
& Benefits



Wealth
Management



Mortgage
& Lending



Capital & Asset
Management



Banks &
Credit Unions



Additional
Financial Services

2800+
PROJECTS

250+
CERTIFICATIONS

95%
FINSERV CLIENTS

Proven Wealth Partners

Experience by the Numbers

As a recognized Salesforce leader in the wealth sector, ShellBlack optimizes workflows and automations to increase efficiency, personalization, and assets under management (AUM).

We've worked with
475+ wealth firms

125,000+

project hours delivered
for our wealth clients

**From independent offices
to nationwide firms**

**40% of Barron's Top 20
RIAs and Mega RIAs
are ShellBlack Clients**



ShellBlack Accelerators

Specialized wealth solutions
at significant savings

AppExchange for our BridgeFT
Multi-Custodian Data Connector



CRM leader on the
**Kitces Financial AdvisorTech
Solutions Map**

Smooth Transitions for Mergers & Acquisitions

With hundreds of M&A-focused engagements to our credit, ShellBlack works as a seamless extension of your transition team to take data migration, change management and CRM onboarding off your punch list.

We have experience migrating data from over 50 different databases, and are continually expanding our expertise.



Migration Success With Key Platforms



ADVISORENGINE
CRM / JUNXURE



MS DYNAMICS



REDTAIL



SALESFORCE



TAMARAC

Certified Training to Gain Buy-In

Our certified Salesforce instructors have years of experience with this critical, and often overlooked, element of change management.



Who We Are

Our leadership team has been working with Salesforce since its early days — whether tapping into benefits as customers, selling professional services, or delivering comprehensive customer relationship management (CRM) solutions. We combine our passion for Salesforce with the business acumen and expertise we've cultivated over the decades.

At ShellBlack, we're Salesforce fans who love what we do!

Core Values

Customer Success

We empower our clients through innovative thinking, technical expertise, and determination.

One Team

A diverse, respectful, and enthusiastic group that holds ourselves accountable and actively supports and listens to each other.

ShellBlazers

We are tenured, certified experts who are passionate about Salesforce and the Salesforce community.



shellblack.com

