



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



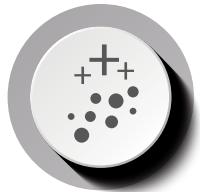
MARKETING  
CLOUD



SERVICE  
CLOUD



EXPERIENCE  
CLOUD



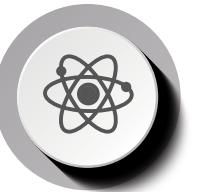
TABLEAU



INTEGRATIONS



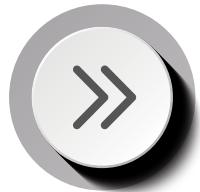
PARDOT  
(MCAE)



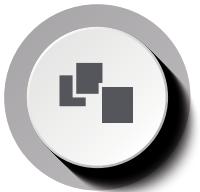
AGENTFORCE & AI



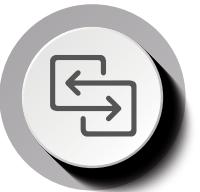
SHIELD



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



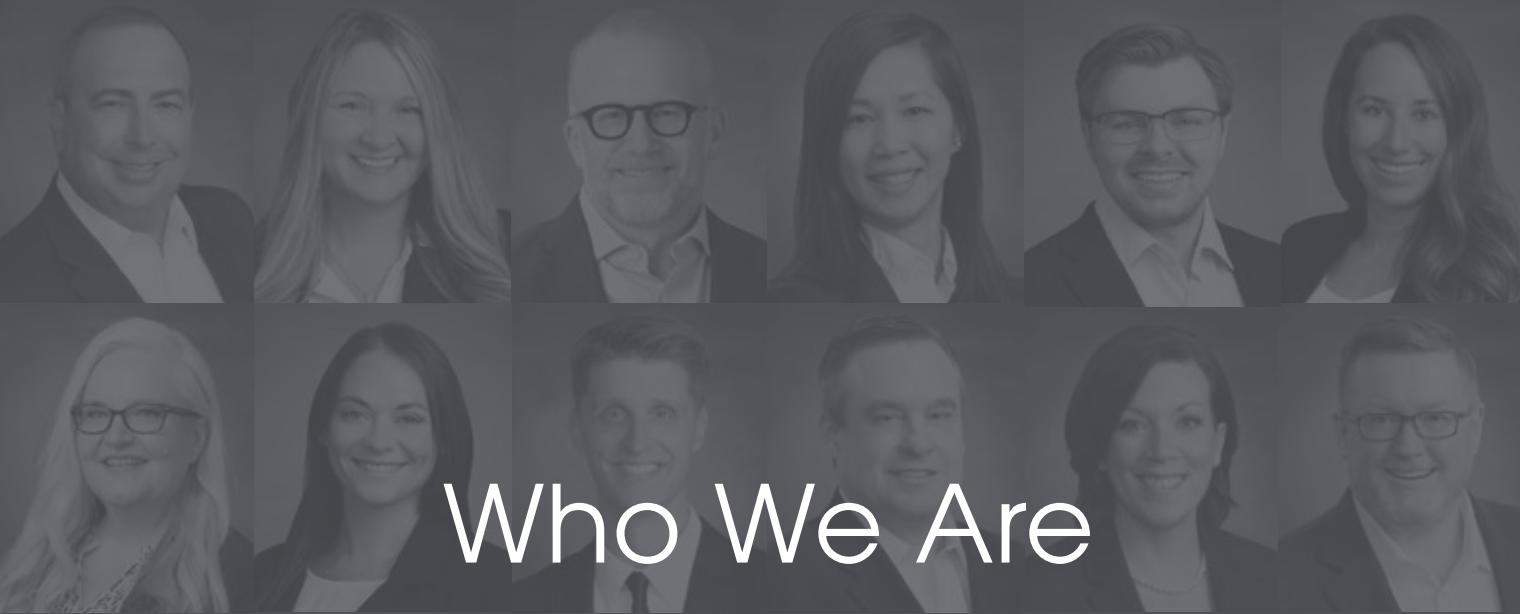
SALESFORCE



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**

