

Evotize Salesforce Services Guide

What we do, how we work, and what you can expect

Whether you are implementing Salesforce for the first time, expanding into new clouds, or needing custom solutions your current setup cannot handle — this guide explains how Evotize can help.

Salesforce Implementation

Getting Salesforce set up properly from the start saves months of rework later. We run a structured process: understand your business, design the right solution, build and configure it, test it thoroughly, and train your team so they actually use it.

- Sales Cloud — pipeline management, forecasting, activity tracking
- Service Cloud — case management, customer support, SLAs
- Marketing Cloud — campaigns, journeys, lead nurturing
- Experience Cloud — customer and partner portals

Custom Development

Salesforce is highly configurable out of the box, but every business has processes that need something more. We build bespoke solutions that sit natively inside Salesforce — so everything stays in one place.

- Custom screens and interfaces built with Lightning Web Components
- Business logic and automation built with Apex
- Advanced workflows using Salesforce Flow
- Custom reports, dashboards, and data views

Integrations

Salesforce works best when it is connected to the rest of your business. We connect Salesforce to your other systems so your team has one source of truth — and nothing falls through the gaps.

- ERP systems (SAP, Oracle, Microsoft Dynamics)
- Marketing and email platforms
- Billing, finance, and accounting systems
- Custom APIs and data warehouses

AI & Agentforce

Salesforce now includes powerful AI tools that can automate decisions, surface insights, and even take actions on behalf of your team. We help you deploy these intelligently — focused on business outcomes, not technology for its own sake.

- Agentforce — autonomous AI agents for sales and service teams
- Einstein AI — smart predictions and recommendations built into your CRM
- Automated workflows that respond to real-time events
- AI-assisted reporting and decision support

Managed Services & Support

Once Salesforce is live, your business keeps evolving. Our managed services team keeps your Salesforce healthy, up to date, and aligned with wherever your business is going next.

- Ongoing administration and configuration changes
- Regular health checks and performance reviews
- User support and training for new team members
- Proactive advice on new Salesforce features and releases

How we work

1. Discovery We start by understanding your business, your team, and your goals — before writing a single line of configuration.

2. Design We propose the right solution architecture, agree on scope, and set clear timelines and milestones.

3. Build Our certified consultants build and configure your solution, keeping you informed at every step.

4. Test & launch We test thoroughly with your team, fix anything that needs fixing, and manage a smooth go-live.

5. Support We stay close after launch — making sure adoption is strong and your team has what they need.