

How Affirma Helps with Salesforce

Salesforce is the world's #1 customer relationship management (CRM) platform, but it is a massive product.

Designed to meet the needs of a large variety of companies, Salesforce is meant to be customized, not simply activated and rolled out to users. **Affirma provides strategic and technical Salesforce support that helps organizations maximize the value of the platform.**



Ensure Salesforce Success

Salesforce is a staple solution for many organizations looking for a clearer, more holistic understanding of their customers. The platform can be a powerful tool to help your marketing, sales, commerce, service and IT teams work together from anywhere so you can proactively manage customer relationships with data-driven insights to help your business grow.



The problem is that Salesforce has become such an **all-encompassing platform involving so many different components and teams, many organizations struggle to ensure optimal implementation and execution** because they are struggling with the following:



Time



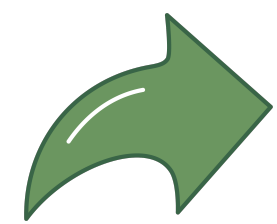
Resources



Bandwidth

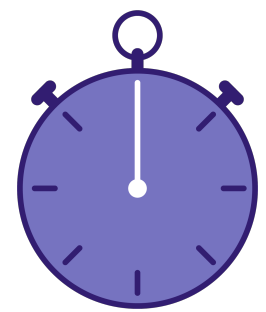
Our team of certified Salesforce Administrators, Architects, Developers, and Designers partner with you to advance your capabilities and help you realize your Salesforce implementation's full potential.

We help you every step of the way to ensure success:



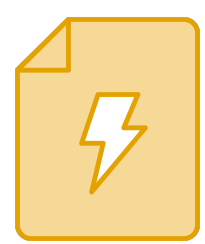
Implementation

We partner with you to strategically plan your implementation, no matter the size or scope, to help you integrate your Salesforce products and customize them to meet your unique needs.



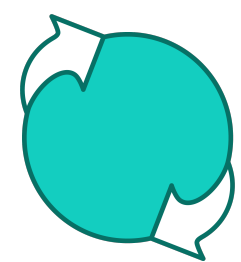
Optimization

We assess technical setup and optimize accordingly to ensure proper alignment with business processes and goals.



Delivery & Execution

Our certified Salesforce consultants deliver successful implementation and provide informed technical expertise and operational support so you can focus on your core business.



Integration

We ensure proper integration and development with all Salesforce products and ecosystem tools so that data flows more efficiently.

Testimonial

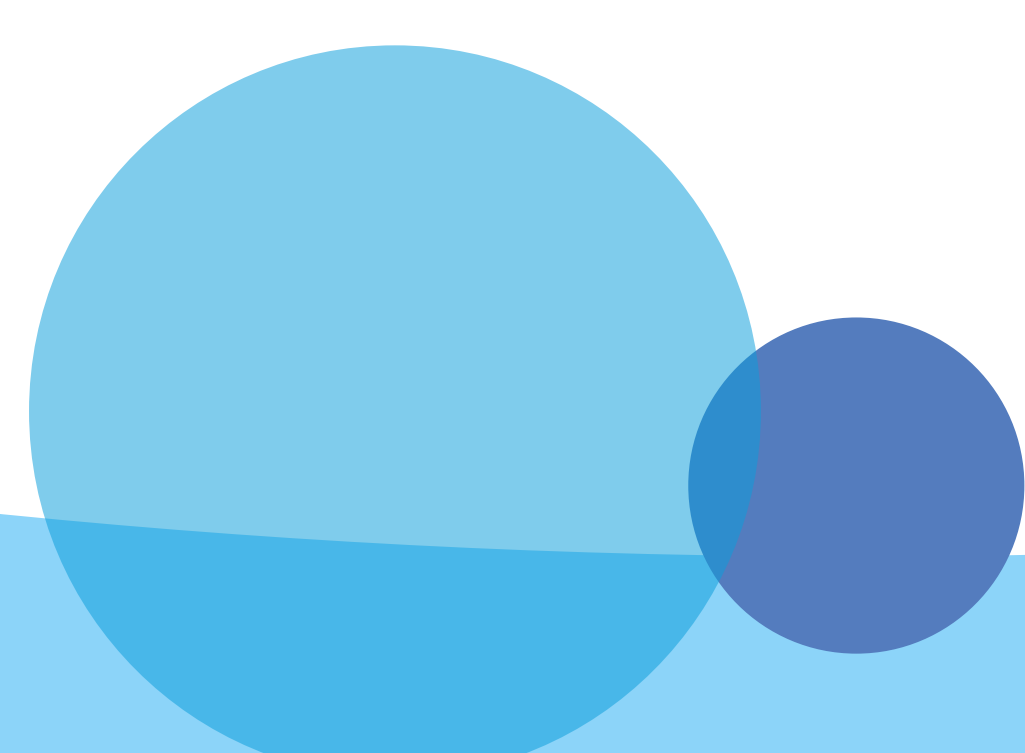


Affirma provided fantastic support helping us migrate to Salesforce Lightning. The team went out of their way to help us in every way possible. We came across multiple issues with design, configuration, development, testing, and migration resulting from our overall inexperience with Lightning. The team stepped up and gave us the expertise and support we needed to make the upgrade happen successfully. I would say in every case, even when we asked for something a bit out of the ordinary—as clients always do—we always received fast, professional help and advice. We could not have received any better support. The upgrade to Lightning was very successful, with only minor issues and no showstoppers. I would like to say a very big “thank you” and we look forward to continuing to work with Affirma.

- CRM Product Manager, A Leading National Federal Credit Union

Affirma's dependable, 21-st century solutions help increase workplace efficiency so that your company can focus on what matters most. Our certified Salesforce consultants ensure seamless platform implementation to solve the following business challenges:

- Business Process Optimization for Sales, Marketing & Service
- Platform Evaluation & Assessment
- Requirements Definition, Technical Design
- Implementation Testing, Deployment
- Training & Change Management
- Ongoing Support & Managed Services
- Integration
- Custom Applications



Customer 360

The full Salesforce product suite can be overwhelming, and we can help take the guesswork out of integration and process implementation. When done correctly, the products work harmoniously, allowing you to better connect to customers by uniting sales, service, marketing, IT, and analytics.

We help you find the right mix of solutions for no matter your team, industry, or business size. Our specialized product solutions help your teams come together to serve customers better and grow your business.



Sales



Service



Marketing



Commerce



Analytics



Integration



Platform



Industries



Learning



Employees



Partners



Success



Einstein AI



Truth

Should you hire a Salesforce Consultant?

If you answer "yes" to any of these, our Salesforce consultants can help.

- You don't have the proper IT support to implement or migrate to Salesforce
- Your workflows are inefficient
- Your team doesn't have time to successfully manage or implement Salesforce
- You want to add customizations to tackle industry or company specific challenges

Our Salesforce work

We have the technical and business expertise to provide strategic consulting for Salesforce to meet you where you are in your journey. We've helped our clients:

- **Gain a better understanding of their customers** by unifying customer data and bridging information from siloed systems
- **Increase collaboration by connecting customers, experts, and knowledge** and improving social interactions across departments
- **Create new revenue generation channels** with up-sell/cross-sell capabilities
- **Improve marketing initiatives** through defining customer segmentations, creating marketing campaigns and measuring success
- **Enhance the customer service experience** by integrating telephony infrastructure and developing applications to support the entire customer lifecycle

Industries Supported



FINANCIAL SERVICES



RETAIL



MEDIA



CONSULTING & BPO



HEALTHCARE & LIFE SERVICES



COMMS



CONSUMER GOODS



PUBLIC SECTOR



MANUFACTURING

Why Affirma?

We care about our clients

Our clients are our focus. Every member of the Affirma team holds customer satisfaction as their #1 priority.

Our consultants are experts in the platform

We have a team of certified Consultants, Developers, and Administrators focused on maximizing the platform's capabilities.

We understand your industry

Our depth & breadth of industry experience allows us to ramp up quickly and drive tailored best practices.

Experience with Financial Services, Technology, Education, Healthcare, Non-Profit, Government & Public Sector, Professional Services & more.

Salesforce Consulting and Beyond

We realize that implementing Salesforce and advancing its capabilities may require evolving other areas of your organization, and we offer the following service support:

- **People and Change Management**

Delivers stronger business and technology transformations through strong people alignment and preparation, including the successful roll-out, adoption and use of Salesforce.

- **Operational Excellence**

Leads to well-defined and implemented processes that are key to delivering business value from your Salesforce implementation.

- **Data and Analytics**

Transforms data from Salesforce and other sources into information that accelerates business insight, ensures operational excellence, and gives you a competitive advantage.

Case Studies

International BPO Company – Salesforce Redesign and Merger / Acquisition Integrations / Managed Service

BUSINESS NEED

A leading BPO and customer experience solutions leader needed assistance designing and executing a migration after acquiring three organizations. The BPO provider was looking to consolidate into a single, efficient Salesforce Org with multiple HubSpot environments. In addition, the client needed a complete redesign of the Salesforce environment and business process across a global user base to help create a more user-friendly and efficient platform.

Affirma worked with the client to plan, design, and implement a more efficient and user-friendly Salesforce environment as well as support successful mergers with three companies.

WHAT WE DID

Affirma partnered with the client to integrate Salesforce and marketing technologies to support successful mergers with all three companies, as well as create a an intuitive, modern, and more robust analytics experience that was not only easy to use, but also provided clear data.

Services included:

- Functional and technical solution design and data migration planning
- Business process integration for Sales, Marketing & Account Management groups
- Salesforce redesign, development, integration, deployment, and end-user change management
- Training, knowledge transfer, launch support and ongoing quality assurance consulting
- Capturing and defining business and functional requirements from forty immediate stakeholders to support hundreds of end users
- Technical approach and architectural design of new platform: Full redesign of **Sales Cloud**, migration from existing org to new org, along with **conversion from Classic to Lightning** experience
- Salesforce redesign, development, integration, deployment, and end user change management
- Ongoing managed service support with Business Analyst, Technical Lead, and Development teams.

Case Studies

Leading BPO Solutions Company - Salesforce Redesign, CPQ & Integration

BUSINESS NEED

A global leader in customer experience solutions and technology services, with over 10,000 employees, came to Affirma for support in a Salesforce and CPQ solutions redesign and platform optimization. Their Salesforce environment had been implemented with over-engineered functionality, cumbersome user experience, and fragmented business processes. The leading BPO provider needed a partner to help implement better data integrity and a more friendly user experience.

A team worked with the client to design, develop, and implement a more efficient and user-friendly Salesforce platform and CPQ integration.

WHAT WE DID

Affirma partnered with the client to create a more fluid Salesforce and CPQ solution experience to help increase efficiency and turn data into actionable insights.

Services included:

- Redefining and optimizing functional and technical requirements for Sales, Marketing, SDR's, Sales Support, Operations and IT groups.
- Determining the future-state architecture design and the technical approach definition.
- Fully redesigning of Sales Cloud, quoting/pricing functionality, forecasting and reporting solutions.
- Conversion from 'Classic' to 'Lightning Experience,' followed by the successful deployment of CPQ.
- Sales Cloud, CPQ & MuleSoft development, integration, deployment, change management, and ongoing end user support.

Case Studies

Federal Credit Union - Salesforce Development & Lightning Migration

BUSINESS NEED

Affirma partnered with one of the largest credit unions in the nation to implement Salesforce Communities and create a secure messaging portal with customized look and feel, and a single sign-on integration to their online banking platform. The credit union needed an entire conversion of the client's Salesforce environment from their Classic solutions to the Lightning experience.

A flexible team worked together to integrate processes and platforms and support Salesforce and integrated platforms across multiple business groups.

WHAT WE DID

Affirma developed a full integration between the credit union's CTI/Telephony infrastructure and Salesforce to provide an automated score carding system that authenticated members over the phone before they reached call center representatives. A flexible team of Developers, Architects, Project Managers, and Business Analysts worked together to integrate processes and platforms and support Salesforce and integrated platforms across multiple client business groups.

Happy employees, cost savings, and business efficiency are just a few examples of the value our clients gain from our partnership.

A hand is shown interacting with a digital interface. The background is a dark blue gradient with a grid of glowing points and lines, suggesting a data visualization or network. Overlaid on this are various lines of code in different colors (blue, green, red, yellow). The code includes terms like 'mod.use_x = False', 'mod.use_y = False', 'mod.use_z = True', 'select= 1', 'ob.select=1', 't.scene.objects.active', 'lected" + str(modified', 'or_ob.select = 0', 'context.selected', 'objects.one.name', '"please select exact)', 'CLASSES', 'CODE', 'es, Operator)', 'mirrored to the select', 't.mirror_mirror_x', 'X"', '34', 'A', '3150208', 'D9023', '54', 'text)', 'active object', 'A4', 'DAB64CE', '3ALE', '9'. The hand is pointing at a specific point on the interface, which is highlighted with a bright pink and white glow. The overall aesthetic is futuristic and tech-oriented.

How our solutions help

Affirma offers an award winning, full-service technology consultancy and we focus on delivering true, measurable business value. We give businesses the power to automate, connect, and simplify organization solutions to run efficiently anywhere, anytime, and under any circumstances. If your organization could use assistance with Salesforce, we are here to help.

With an industry-leading 98% customer satisfaction rating across more than 1500 projects, Affirma is dedicated to delivering dependable and reliable digital, business and technology solutions that exceed your expectations – and it shows.

We have consistently been named one of Washington's Best Places to Work, placed as a 5-Time Inc. 5000 Honoree, and ranked as a most promising IT provider by the CIO Review.

Get in touch today to schedule your free consultation and learn how Affirma can help you achieve your unique needs.




Affirma Consulting

We Are A Global Company

Affirma Consulting features a full-service digital marketing, business, and technology agency headquartered in the Seattle area with a global presence. As your out-of-house solutions team, we take the guesswork out of marketing and continually deliver measurable business value.



Contact

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Locations

- **United States**
 - Washington
 - Nevada
 - California
 - Arkansas
 - Texas
- **Ireland**
- **Romania**
- **India**