



# SALESFORCE IMPLEMENTATION

## PARTNER WITH ARMANINO TO MAXIMIZE YOUR SALESFORCE SOLUTION

### DRIVE BUSINESS EXCELLENCE WITH SALESFORCE

In today's digital age, an effective customer relationship management (CRM) solution is critical to push your organization forward and enhance your productivity in sales, marketing and customer service.

Salesforce is a market-leading solution that can help you improve your end-to-end business processes and realize the return on investment you expect from your CRM.

### YOUR BENEFITS

There are several key components to recognize about Salesforce, especially when it comes to maximizing your solution to its fullest. Some of those key features include the following:

**Dashboarding and insights** – Salesforce quickly collates your data digitally, giving you the ability to dashboard any data point in the system. You can track your full sales pipeline and analyze lead conversion to identify what traits lead to more transaction closings, allowing you to focus on high-probability prospects.

**Individual achievement** – Empower your sales staff with details about sales revenue, volume, close rates and transaction frequency and gain a holistic view of your team.

**Forecasting** – With Sales Cloud, you can improve your forecasting by setting milestones, closing probability and expected revenue for each lead — giving you better insight for budgeting.

**Nearly endless possibilities** – When you work with a Salesforce registered partner like Armanino, you can expertly craft custom-tailored solutions beyond the sales pipeline.

**Privacy and visibility** – To run efficiently, you need to be able to share key information between departments, which can be tricky if there is confidential information in the database. Salesforce can be configured to create different user roles with varying levels of visibility for your users, from customer service reps up to finance executives.

**Customized point of sale** – If you require a point-of-sale system that is flexible to meet your specific needs, Salesforce CPQ can **configure** bundled products, adjust special **pricing** and **quote** for conditional terms.

**Open API** – Salesforce's open API allows you to integrate your database with third-party ERP solutions to give you all your data in real time.

**Community cloud** – Create a one-stop shop for your customers and partners by building a community where you can engage directly with your audience in public or behind a log-in wall to provide everything from FAQs and troubleshooting forums to member/account services and help tickets.

### HOW WE CAN HELP

**Unleash the Power of Your Salesforce CRM**  
Your organization is unique, and a run-of-the-mill Salesforce implementation won't cover all the specific challenges you face. Armanino, a certified Salesforce implementation and AppExchange partner, can help you maximize your ROI, gain the full power of the solution and avoid costly mistakes. When you partner with us, you gain access to:

**Certified Salesforce consultants** – Our team specializes in aligning your CRM and ERP through diverse industry expertise and a tailored implementation to fit your business goals.

**Management advisory services** – Access expert advice for business process reengineering, IT governance and compliance, and best practice recommendations across sales, marketing and customer service.

**Preconfigured integration packs** – Connect your ERP quickly with [preconfigured integrations](#) to systems such as Sage Intacct or Microsoft Dynamics 365. Or we can develop a custom integration with your ERP solution.

**Ongoing support** – Our Salesforce consulting and development team can help you realize continuous improvement from your CRM solution through implementation, customization, training and support services.

### ARMANINO ADVANTAGE

Armanino provides an integrated set of accounting services and technology solutions to a wide range of organizations. You can count on us to think strategically and provide the sound insights that lead to positive action.

### CONTACT:

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