

Salesforce Consulting Services

Transform Your CRM Strategy with Expert Salesforce Consulting

PLAN

IMPLEMENT

CUSTOMIZE

OPTIMIZE

Accelerate Business Growth with Salesforce Consulting

- Align Salesforce with business objectives and workflows
- Improve CRM processes, visibility, and productivity
- Customize Salesforce around unique business requirements
- Integrate Salesforce with existing systems and applications
- Migrate and manage business data with greater confidence
- Optimize Salesforce for long-term scalability and growth

THE GOAL

Make Salesforce work for your business — not the other way around.

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Make Salesforce Work for Your Business

The right consulting partner connects technology decisions with business outcomes.

Business Alignment

Build a Salesforce strategy around business goals and processes.

Automation

Reduce repetitive work and streamline critical workflows.

Connected Data

Bring information together across CRM and business systems.

User Adoption

Create experiences that are easier for teams to use and manage.

Scalability

Design Salesforce to evolve as business requirements change.

Better ROI

Get greater value from your Salesforce investment.

End-to-End Salesforce Consulting Solutions

Custom Development

Tailored Salesforce functionality for unique business needs.

Implementation

Configure and deploy Salesforce around defined requirements.

Integration

Connect Salesforce with ERP, marketing, support, and third-party systems.

Data Migration

Plan, map, cleanse, migrate, and validate business data.

QA & Testing

Test functionality, reliability, and production readiness.

Customization

Adapt objects, fields, permissions, workflows, and processes.

Support & Maintenance

Keep Salesforce optimized with ongoing improvements.

[Salesforce Development Services →](#)

[Salesforce Integration Services →](#)

Build the Right Salesforce Strategy

- Understand business objectives, users, processes, and challenges
- Assess the current CRM environment and identify gaps
- Define Salesforce requirements and priorities
- Recommend suitable Salesforce products and solutions
- Create a practical implementation roadmap
- Plan for adoption, optimization, and future scalability

STRATEGY FLOW

BUSINESS GOALS



SALESFORCE STRATEGY



ROADMAP



GROWTH

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Configure Salesforce Around Your Business

- Configure Salesforce environments, roles, and permissions
- Create custom objects and fields
- Configure workflows and automation
- Customize CRM functionality around business requirements
- Test changes before deployment
- Support adoption through a structured implementation approach

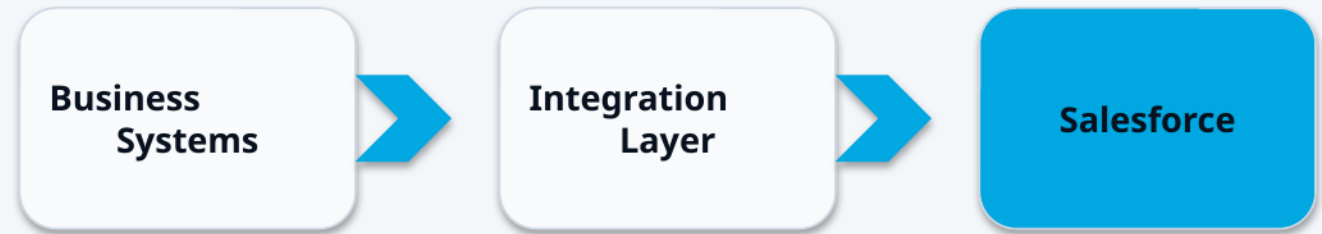
IMPLEMENTATION FLOW

Business Requirements
↓
Salesforce Configuration
↓
Customization
↓
Testing
↓
Deployment

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Connect Salesforce With Your Business Ecosystem

- ERP systems
- Marketing platforms
- Customer service applications
- Legacy systems
- Third-party tools
- APIs and middleware



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Migrate Your Business Data to Salesforce

01

ASSESS

Review source systems and data quality

02

CLEAN

Remove duplicates and prepare data

03

MAP

Map source fields to Salesforce

04

MIGRATE

Move data using a controlled process

05

VALIDATE

Verify accuracy and completeness

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Salesforce Consulting Across Multiple Clouds

Sales Cloud

Sales processes, pipeline visibility, and customer management.

Service Cloud

Customer service operations and support workflows.

Marketing Cloud

Connected customer engagement and marketing.

Commerce Cloud

Scalable commerce and order management.

Experience Cloud

Customer, partner, and community experiences.

Lightning

Modern, productive Salesforce user experiences.

Build a Connected Salesforce Environment

Amazon Redshift

Connected business data and workflows

Braintree

Connected business data and workflows

Cvent

Connected business data and workflows

SQL

Connected business data and workflows

WordPress

Connected business data and workflows

Zapier

Connected business data and workflows

Zendesk

Connected business data and workflows

Jira

Connected business data and workflows

QuickBooks

Connected business data and workflows

SAP

Connected business data and workflows

Google services

Connected business data and workflows

Microsoft services

Connected business data and workflows

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Your Salesforce Consulting Partner

12+

Years of Experience

40+

Salesforce Developers

500+

Deployments

End-to-End

Salesforce Capabilities

- Personalized Salesforce solutions
- Experience across multiple Salesforce Clouds
- Consulting, development, integration, implementation, migration, testing, and support
- Business-focused recommendations designed for long-term value

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From Business Challenge to Salesforce Success

1

Discover

Understand goals, users, systems, and challenges.

2

Analyze

Identify gaps, inefficiencies, and opportunities.

3

Strategize

Create a Salesforce roadmap aligned with priorities.

4

Implement

Configure, customize, integrate, migrate, and test.

5

Optimize

Improve performance, adoption, and workflows.

6

Scale

Support evolving business and Salesforce requirements.

Turning Salesforce Challenges Into Business Solutions

Greens List Barristers

Sales Cloud, Experience Cloud portals, mobile applications, and third-party integrations.

Hubtek

Experience Cloud customer portal to improve communication and accessibility.

Sysdig

Customer portal development to improve the customer support experience.

NuLife Institute

Health Cloud implementation to improve operational efficiency.

ImprimisRx

Commerce Cloud implementation to improve eCommerce and order management.

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What the Right Salesforce Consulting Partner Can Deliver

Expert Guidance

Professional recommendations based on business requirements.

Personalized Solutions

Salesforce configured around your processes.

Seamless Integration

Connected systems and streamlined workflows.

Reduced Costs

Fewer implementation mistakes and inefficient processes.

Ongoing Support

Continuous assistance and optimization.

Improved ROI

Greater adoption, productivity, and CRM effectiveness.

Flexible Salesforce Consulting Engagement Models

FIXED PRICE

Best for clearly defined projects, stable requirements, and specific deliverables.

PAY-AS-YOU-GO

Best for evolving requirements, continuous development, and iterative projects.

DEDICATED RESOURCE

Best for long-term development, maintenance, and dedicated Salesforce expertise.

Choose an engagement model that matches your scope, timeline, and growth plans.

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Ready to Get More From Salesforce?

Build the right strategy. Implement with confidence. Optimize for growth.

TALK TO SALESFORCE EXPERTS

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