



**Transform at the
Speed of Business
with Managed Services**



accelerize360
innovate. accelerate. achieve

Get ahead of the digital curve.

With ever-evolving customer expectations and new, disruptive competition, the pressure is on for financial services firms to get ahead of the digital curve.

Accelerize 360 can help. We optimize Salesforce for your unique roadmap—identifying opportunities for automation, cross-functional collaboration, and creating seamless customer experiences.

Collaborate with a team of multi-cloud experts who know your business as well as they know Salesforce—and work with you on an ongoing basis to help you stay on top of new releases, review KPIs, and unlock the full potential of your technology investment.

SERVICES

UX/CX enhancements

Create amazing digital experiences for employees and customers

Data management

Monitor and improve the quality, security, and integrity of the data you rely on in Salesforce

Business automation

Increase efficiency and empower your sales, service, and marketing teams by automating processes

Process unification

Bring new work streams into Salesforce to have a single operating system for the business

BENEFITS

Maximize your Salesforce ROI

Unleash the full potential of Salesforce by collaborating with a team of experts that help you deliver on your sales, marketing, and service goals.

Accelerate your digital transformation

Transform your processes so you can work smarter, innovate faster, and get an edge over the competition.

Access cross-functional talent

Tap into a wide range of skills at a fraction of the cost of bringing full-time talent on board.

Get the right level of support for your business

Scale services up and down to fit your business/project needs.

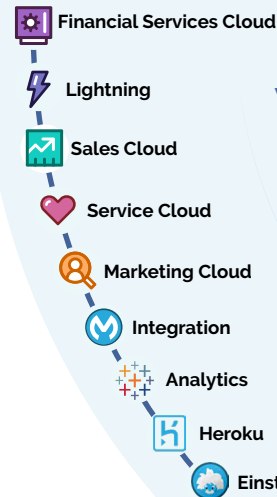
MULTI-CLOUD EXPERTISE & STRATEGIC ENGAGEMENT

Managed Services gives you anytime access to dedicated Salesforce experts who can help bring your business vision to life.



We know Salesforce

300+ Implementations



We're everywhere



WHY
ACCELERIZE
360

We're financial services experts



Laser-focused on customer success

We utilize powerful solutions to help our customers fuel productivity, boost revenue, and empower digital transformation in the dynamic financial services industry.

Wealth management

Automate workflows for new client acquisition, upsells, onboarding, and ongoing service operations.

Easily calculate property equity share different investors.

Increase assets under management (AUM) through marketing automation.

Insurance firms

Keep track of your entire value chain—from vcarriers to retailers, customers, and policies.

Automate commission calculation and reconciliation.

Tie in sales to marketing, underwriting, and claims to get everyone on the same page.



From driving a first-class marketing program to developing a growth-focused marketing tech stack, Accelerize 360 has brought a level of sophistication we have not found anywhere else.”

JIM GRAF
CEO
LEADS ON DEMAND

Banks/credit unions

Empower self-service onboarding with a customer portal.

Track analytics to identify patterns in your customer base.

Integrate Salesforce and Encompass for end-to-end loan account tracking.

Capital markets

Streamline your due diligence process to increase efficiency.

Maintain capital calls through a single platform.

Manage acquisitions with a custom data model that enables service requests.

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ABOUT
ACCELERIZE
360

Armed with industry best practices and an appetite for challenges, Accelerize 360 pushes the limits of Salesforce—creating disruptive solutions for financial services firms.

