

Transform at the Speed of Business with Managed Services

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

PROCESS UNIFICATION	Bring new work streams into Salesforce to have a single operating system for the business
BUSINESS AUTOMATION	Increase efficiency and empower your sales, service, and marketing teams by automating processes
DATA MANAGEMENT	Monitor and improve the quality, security, and integrity of the data you rely on in Salesforce
UX/CX ENHANCEMENTS	Create amazing digital experiences for employees and customers

Benefits

Accelerate your digital transformation

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

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.

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.

Who we are

-  SYSTEM ADMINS
-  SUCCESS MANAGERS
-  DEVELOPERS
-  BUSINESS ANALYSTS
-  OPERATIONS EXPERTS

How we work



PLAN

Discuss strategic initiatives and deliverables for the upcoming quarter



OPTIMIZE

Collect feedback and resolve issues during weekly status checks



REVIEW

Evaluate progress monthly



EXECUTE

Test and deploy production releases every month



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 OF LEADS ON DEMAND

Why Accelerize 360

- We know Salesforce
- We're everywhere
- We're financial services experts

Over 300 implementations



FINANCIAL SERVICES CLOUD



LIGHTNING



SALES CLOUD



SERVICE CLOUD



MARKETING CLOUD



INTEGRATION



ANALYTICS



HEROKU



EINSTEIN

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 carriers 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.

BANKS AND 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.


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.

find out more

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