



Salesforce

services

Customer-centric sales, at scale

Your relationships with your customers are vital. But as business scales, it gets increasingly difficult to gauge customer behavior and engage in a multichannel marketplace. Managing, tracking and optimizing these relationships becomes impossible without the right technology.

Salesforce is a tool that turns complex customer behavior into useful metrics. From sales support to marketing automation, customer support and omnichannel commerce, Salesforce helps you create and manage great customer experiences.

As a cloud-based system, Salesforce is a highly flexible and extendable solution. You have complete freedom to customize Salesforce for your business and make sure it works the way you do.

Focused on your return

Wipfli combines strategic business acumen with a leading cadre of Salesforce developers and architects. Together, we guide clients to thoughtful implementations with measurable ROI and long-term impact.

Wipfli helps you customize this powerful tool and get the most out of your investment. Our services include full Salesforce lifecycle management, from planning and design through to user-training, support and solution enhancement.

Plus, we're a Salesforce registered partner, which means Salesforce has recognized our firm as having the technical expertise and resources to help organizations optimize Salesforce and maximize their return on investment.

Transform your customer experience.

WIPFLI

Transform your work and drive your success

Whether you are new to the Salesforce ecosystem or it's time to optimize the system you have in place, we can help. Wipfli provides full-cycle development and support, so you can get a platform built for your business.



Roadmap

Digital transformation starts with a plan. You need a partner who can guide both technical and strategic decisions. We advise you through a Salesforce evaluation, helping you determine whether the timing is right and which Salesforce products will achieve your goals.



Implementation

Our Salesforce implementations follow a proven methodology, from planning and design, through building, deploying and validating. We analyze requirements, map Salesforce features to your goals, design rules, plan data migrations and integrate with your existing systems.



Integration

Streamline the connections between Salesforce and your established business tools. Salesforce integrations unite disparate systems for a single source of truth. Wipfli helps you plan and execute integrations to ERPs, accounting, third-party solutions and the Salesforce AppExchange.



Migration

Migrate information from your legacy systems without data loss. We guide the process, from data selection to mapping, migration and quality assurance.



Custom development

When out-of-the-box won't do, Wipfli configures and extends Salesforce capabilities. We build custom solutions on the Salesforce platform, developing exclusive functionality that matches your business needs and your audience's expectations.



Change management

We believe that change management, not just technical execution, sets our Salesforce implementations up for real-world ROI. We address internal pain points and user adoption, spending time on the people-issues that can fuel or frustrate project success.

Let's get started

Choose a Salesforce partner committed to your ROI.

wipfli.com/Salesforce