Salesforce Profile

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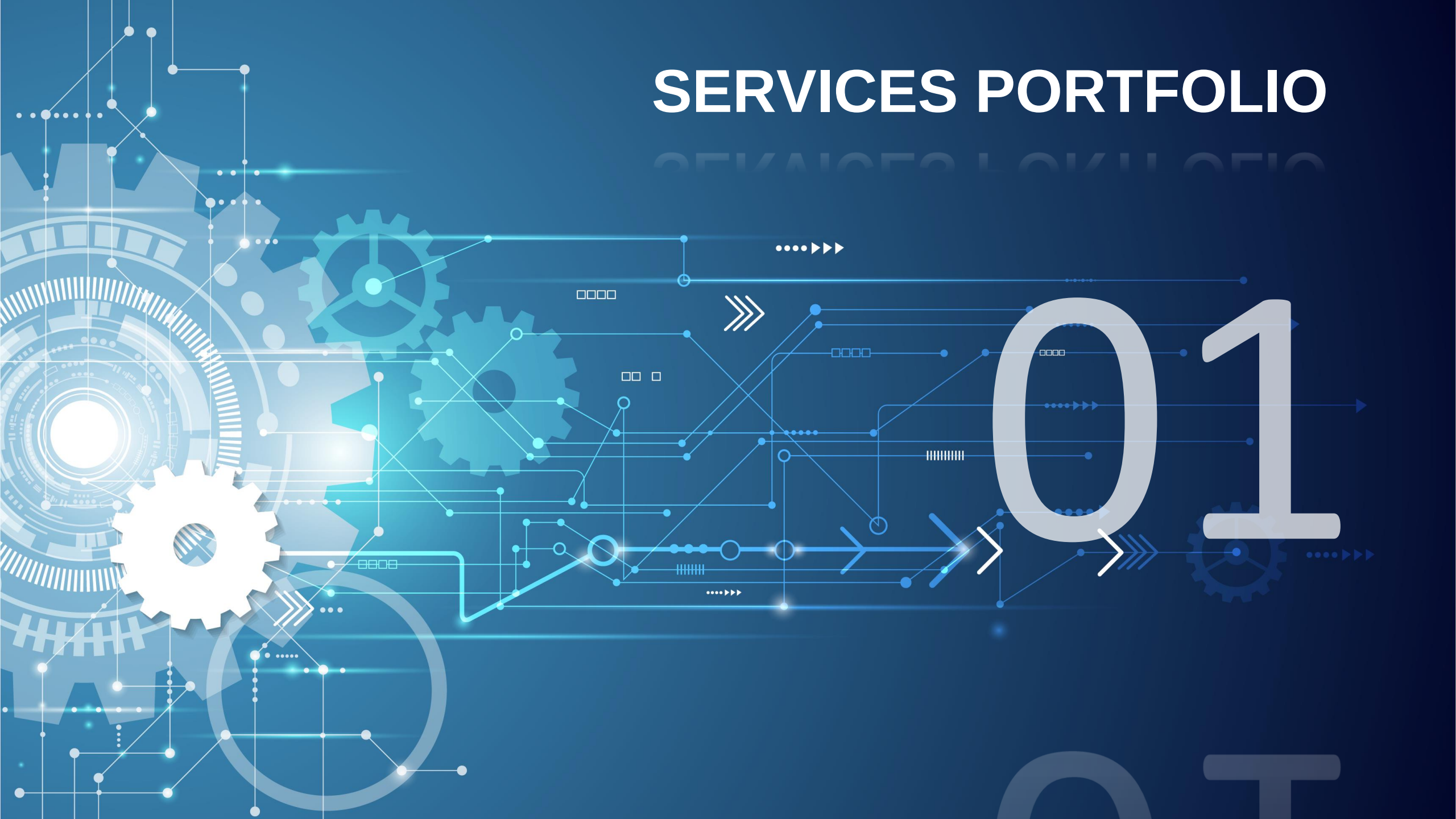
SERVICES PORTFOLIO



OUR PRODUCT PORTFOLIO

1. Salesforce CRM

Sales Cloud
Service Cloud
Marketing Cloud
Experience Cloud
Communications Cloud
& More…

2. Customer Data Platform

Salesforce Customer Data Platform
MuleSoft Anypoint Platform
Salesforce Einstein (AI & ML)
Salesforce Tableau

3. Contact Center

Call Center
miniCRM
Ticketing
Knowledge Base
Cisco - Salesforce Integration

4. Digital Transformation

Salesforce - Industry Solutions
Consulting

SALESFORCE SERVICES OFFERING

DIGITAL TRANSFORMATION

Digital transformation strategy & Roadmap

Salesforce implementation & Cloud migration

Customer Data Platform and Analytics

Salesforce Solution for Industries

Salesforce Maintenance / Outsource

DATA INTEGRATION & CONVERSION

Mulesoft Anypoint Platform integration

Backup&Restore, Data Conversion & Migration

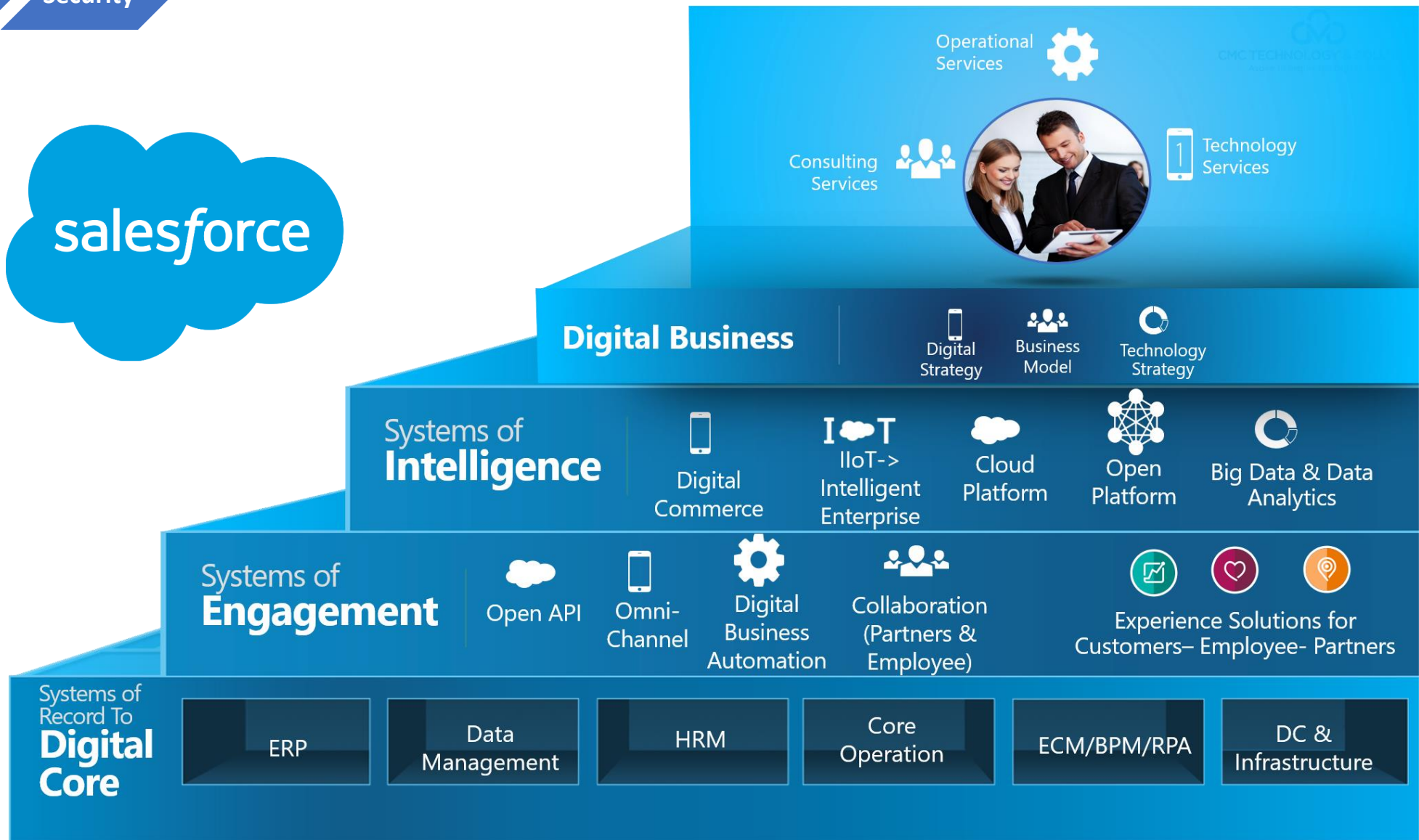
Data Cleansing, De-duplicating, Unifying

Data Mining by AI & ML Einstein Analytics

Data Encryption with Salesforce Shield

DIGITAL TRANSFORMATION SERVICE

Digital | Cloud | Security



DIGITAL SERVICES with SALESFORCE CONTACT CENTER

- **Omni Channel**
- **Secured and Scalable**
- **Highly Configurable**
- **Cloud / Premise / Hybrid**

MuleSoft

SALESFORCE CRM

CONNECTING SOLUTION

IIST'S SALESFORCE TEAM

IIST's Salesforce Team

Salesforce Certificates

Salesforce Certified Development Associate

- Certified Platform App Builder
- Certified Platform Developer I & II
- Certified Administrator
- Certified Advanced Administrator
- Certified Service Cloud Consultant
- Certified Sales Cloud Consultant
- Certified Field Service Consultant
- Certified Experience Cloud Consultant
- Certified CPQ Specialist
- Certified Data Architect
- Certified Integration Architect
- Certified Development Lifecycle and Deployment Architect
- Certified Application Architect
- Certified Sharing and Visibility Architect

15+ Projects — Total number of projects were implemented successfully

20+ Employees — Well qualified and experienced in multiple industries

VARIOUS INDUSTRIES

- Government
- Banking
- Insurance
- Oil and Gas
- Manufacturing
- Real Estate
- Distribution
- Telecommunication
- IT
- Logistics
- Electricity

Providing Services

Service	Sales Cloud	Service Cloud	Marketing Cloud	Data Cloud	Einstein Copilot	B2C Commerce	B2B Commerce	Industry Clouds	Experience Cloud	Platform Skills
Product	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Service	Standard Fields	Custom Fields	List Views	Formulas	Data Quality	Reporting	Data Sharing	Relationships	ERDs	SOQL/ DML	Duplicate Management	Data Governance
Data Modeling	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Service	SFDC & Business Project Management Gather	Requirements	BRD	Designer's Mindset	Change Management	Process mapping / Swimlane diagram	Agile methodologies	Process Overhaul	Migrate from Other Systems
Business Process Analysis	✓	✓	✓	✓	✓	✓	✓	✓	✓

Providing Services

Service	Workflow & Assignment Rules	Process Builder	Approvals	Visual Workflow	Limitations & Combos	Lightning Flows
Automation	✓	✓	✓	✓	✓	✓

Service	Imports Exports	SOQL/DML	Large Data Volumes	Data Skew	Data Flow	Segmentation	Integration Design	Platform Events	Design patterns
Data Architecture	✓	✓	✓	✓	✓	✓	✓	✓	✓

Service	Visual Studio Code	Lightning Component with Server-Side Apex	Controller	Lightning Data Service	Aura Components	Salesforce DX	Mobile SDK	Platform Encryption
LC & LWC	✓	✓	✓	✓	✓	✓	✓	✓

Providing Services

Service	Developer Console & Execute Anonymous Blocks	Collections	Loops	SOQL/ SOSL	Visualforce	Intermediate Triggers	Test Classes	Bulkify Code
Apex	✓	✓	✓	✓	✓	✓	✓	✓

Service	Custom Settings	Exception Handling	Violations in Visualforce & Apex	Apex Patterns: Service Layer	Test Scheduling, Automation & Call Out Logic	Asyncronous Apex	Metadata
Apex	✓	✓	✓	✓	✓	✓	✓

Service	Roles & Profiles	Permission sets	Teams & Queues	Groups	Sharing Rules	Groups Permission	Apex Sharing
Security & Access Management	✓	✓	✓	✓	✓	✓	✓

Providing Services

Service	SOAP Callouts	REST Callouts	Heroku	Google Integrations	SAP Integrations
Integrations	✓	✓	✓	✓	✓

Service	Tableau	CRM Analytics / Report Intelligence	Einstein Copilot	Data Cloud
Data Analytics	✓	✓	✓	✓

DETAILED CASE STUDIES

CASE STUDY #1: Real Estate Customer

Challenges & Issues

- Company data was sorted in silos or stored in Excel files and multi legacy systems, which made it difficult to share it across departments
- Low scalability of the existing platform
- No ability to tailor the system the way the company needed and let teams use it in different ways.

IIST Solutions

The following scope has been done

- Implementation and Support Operation of Salesforce Projects
- Analytics customer subsidiary's pain points
- Create proposals, and design a system landscape: How can leverage Salesforce products benefits when working with customer's existed system
- Implementation of business processes on Salesforce platform
- User training
- System operation and support
- Migrate and Transform Data
- Consult and make system improvements

Technology

- Sales & Service Cloud, Commerce Cloud, Marketing Cloud, Pardot, Experience Cloud

Development Methodology

- Salesforce Adaptive Methodology

Overview

IMPLEMENTATION AND SUPPORT OPERATION OF SALESFORCE CRM SYSTEM
Sales & Service Core CRM
Commerce Cloud
Marketing Cloud + Pardot
Experience Cloud

SYSTEM INTEGRATION
Call Center
DataLake
Loyalty System
Industry System (Automotive, Heath Care, Hospitality, Education)
External App, Web, Social Network, GA360 …

Results

- The service runs smoothly thanks to IIST’s powerful technical support team

CASE STUDY #2: Banking

Challenges & Issues

Need solution for:

- Access all customer information from different channels at a glance in one single source of truth
- Tied up with a user-facing app for credit card payments, letting service reps identify issues customers face on the spot to provide better service.
- Easily navigate between the back-office system for credit checks and communication with users in one centralized app

IIST Solutions

The following scope has been done

- To help customer meet their goals: Transforming the financial industry, raising the value of life; motivating each person to unlock their potential and act bravely for outstanding things. We and Salesforce propose Financial Service Cloud to customer.
  - Setting the Foundation for customer by Salesforce Platform
  - Enhanced Service Center
  - CRM Transformation
- Support for operation and technical maintenance

Technology

- Financial Service, CRM Analytics, Lightning Component, Visualforce page, Process builder, Trigger & Class.

Development Methodology

- Scrum

Overview

Results

- The service runs smoothly thanks to IIST's powerful technical support team

CASE STUDY #3: Securities Customer

Challenges & Issues

- Company is an investment banking firm focused on the wholesale distribution of real estate based investment offerings to Broker-Dealers and Registered Investment Advisors
- They chose to build their business on the Salesforce platform as part of their commitment to delivering trust, transparency and a seamless experience to their stakeholders, partners and clients

IIST Solutions

We offered the Sales Cloud system deployed for customer that is customized according to the business needs of customer including the following functions:

- System administration and users
- Manage customers & contacts
- Sales opportunity management
- Product Management
- Contract Management
- Activity Management
- Manage transaction account information (Customer Account)
- Manage transaction information of the account (Transaction)

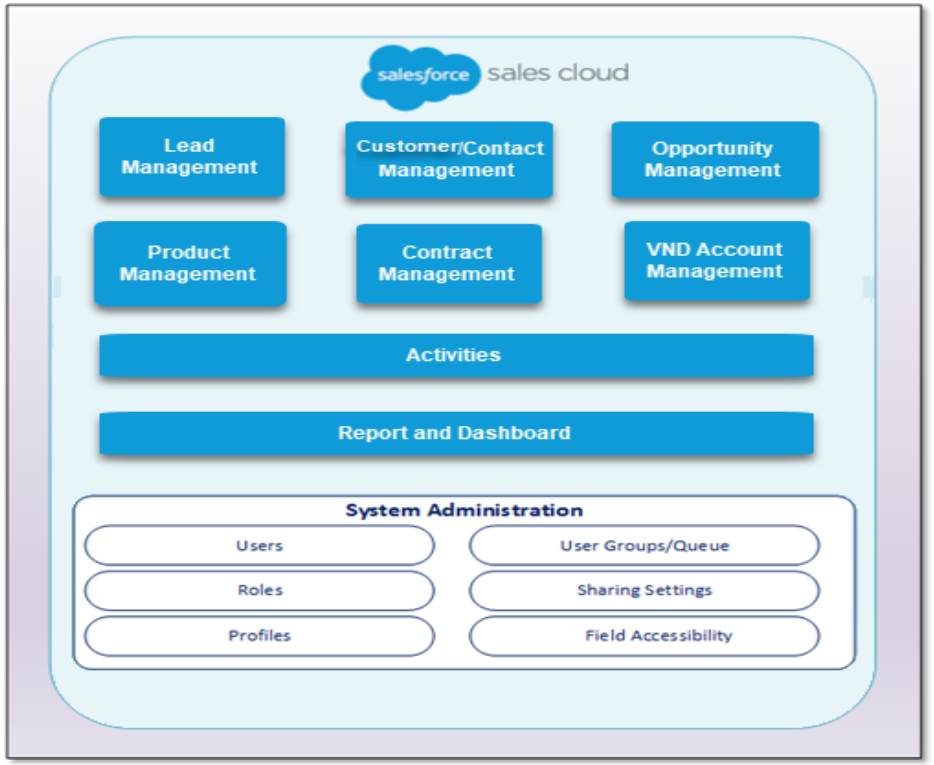
Technology

- Apex, Lightning Component, Visualforce page, Community Builder, Process builder, Trigger & Class.

Development Methodology

- Scrum

Overview



Results

- The service runs smoothly thanks to IIST's powerful technical support team

Spasibo
Juspaxar
Kiitos
Nirringrazzjak
Multumesc
Merci
Obrigado
Kiitos
Raibh Maith Agat
Chokrane
Mochchakkeram
Obrigado
Grazie
Arigato
Grazie
Asante
Dank Je
Thank
Chokrane
Mochchakkeram
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