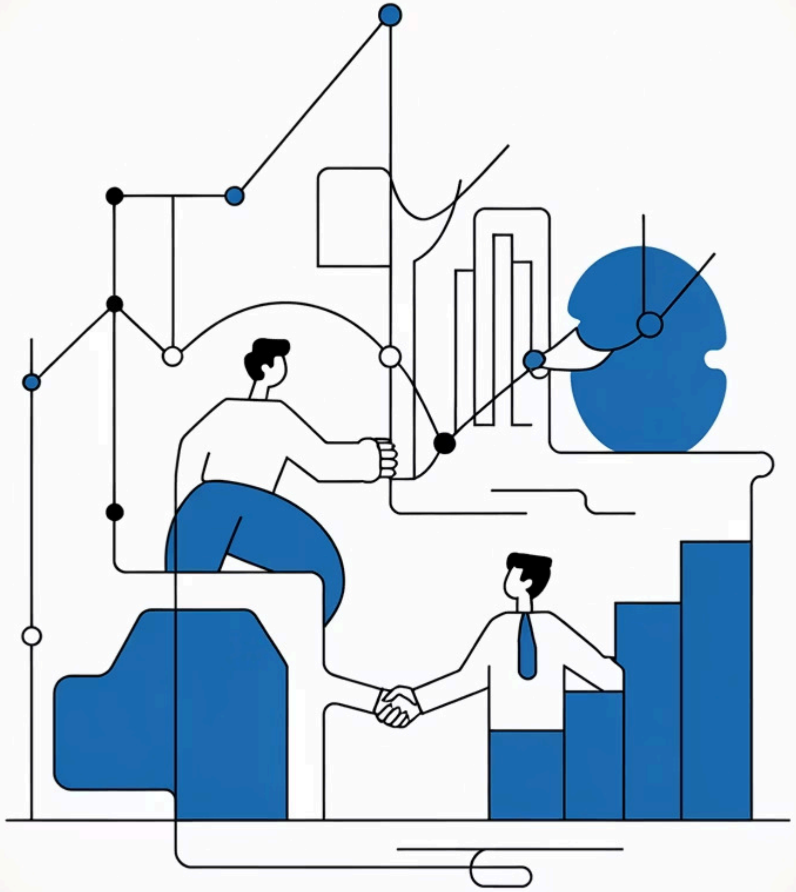


# Vantage Point's Strong Salesforce Expertise for Financial Services

**Solid Salesforce platform knowledge across Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, and AI solutions, combined with proven MuleSoft integration expertise for complete financial services transformations.**

Ready to discuss specific opportunities? [Schedule time with David and Randy] to explore partnership opportunities and next steps in financial services transformations.

# Building on Our Collaborative Conversation

Thank you for the engaging conversation about partnering to win together in financial services.

### Solid Expertise

Specialized knowledge across banking, insurance, wealth management, and the Salesforce platform ecosystem, including Financial Services Cloud (FSC).

### Platform Synergies

Combined strengths in Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), and MuleSoft integration for complex challenges.

### Integrated Solutions

Robust solutions leveraging Agentforce and AI to drive mutual growth and customer success.

### Success Roadmap

Actionable strategies for vibrant collaboration delivering effective Salesforce solutions.

Explore detailed case studies and learn more about our robust Salesforce solutions for financial services at [vantagepoint.io](vantagepoint.io).

Ready to discuss specific opportunities and chart a success roadmap for your organization? Schedule time with David and Randy to explore partnership opportunities: [Schedule a meeting]()

**Today's Focus:** Translating insights into concrete strategies for mutual success, leveraging our solid Salesforce platform knowledge, including Financial Services Cloud (FSC), and MuleSoft integration capabilities across financial services.

# Collaborating with Salesforce: End-to-End Financial Services Solutions

We partner with Salesforce Account Executives to unlock opportunities and deliver meaningful value through strong platform knowledge spanning Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, AI solutions, and seamless MuleSoft integration.

Ready to unlock specific opportunities for your clients? **Schedule time with David and Randy** to explore how we can partner.

### Retail & Commercial Banking

Core banking modernization, digital transformation, omnichannel experiences, treasury management

### Wealth & Asset Management

Portfolio management, custodian connectivity, advisor productivity, alternative investments

### Property & Casualty Insurance

Agency management systems, policy administration, claims processing

### Life & Health Insurance

New business processing, accelerated underwriting, Medicare Advantage

### Consumer Lending & Fintech

Point-of-sale lending, gig economy finance, BNPL platforms

### Commercial & Specialty Finance

Equipment financing, invoice factoring, asset-based lending

## Core Salesforce Expertise

### Sales Cloud, Service Cloud, & Financial Services Cloud (FSC)

Client acquisition, relationship management, and responsive customer support optimization, tailored for financial institutions.

### Marketing Cloud

Personalized client journeys, campaigns, and engagement strategies.

### Agentforce & AI Solutions

Agent intelligence, AI-enhanced insights, and automation capabilities.

### MuleSoft Integration

Unified system connectivity for seamless operations and data flow.

### Core Platform Capabilities

Custom development, security, governance, and robust Salesforce platform capabilities.

We act as a true extension of your team, bringing strategic partnership and understanding of financial institutions' unique challenges in a competitive landscape.

Want to discuss how our expertise can benefit your clients and explore specific partnership opportunities? **Connect with David and Randy** to schedule a deeper dive.

For detailed case studies and a deeper dive into our expertise, visit **vantagepoint.io**.

VANTAGE POINT

# End-to-End Solutions: Salesforce Platform with MuleSoft Integration

We collaborate with Salesforce AEs, applying solid platform knowledge across Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), and MuleSoft integration to architect sophisticated solutions that drive digital transformation and measurable success.

## Salesforce Core Clouds

**Sales Cloud, Service Cloud, & Financial Services Cloud (FSC):** CRM optimization, customer relationship management, and service operations with Agentforce solutions tailored for financial institutions.

**Marketing Cloud:** Personalized customer journeys, automated campaigns, and data-driven engagement strategies.

**Platform & Experience Cloud:** Custom applications, self-service portals, and secure digital experiences.

**AI Solutions (Einstein):** Predictive analytics, intelligent service flows, and enhanced decision-making.

## MuleSoft Integration Suite

**Anypoint Platform:** API design, management, and integration orchestration with System, Process, and Experience APIs.

**IDP & RPA:** Automated document processing and legacy system integration for streamlined workflows.

**Composer & Flow:** No-code integration and business user empowerment.

**DataGraph & Flex Gateway:** Unified data access and high-performance API security.

Ready to explore how these solutions can benefit your organization? Schedule time with David and Randy to discuss specific opportunities.

**Integrated Solutions:** Our impactful solutions combine Salesforce core clouds, including Financial Services Cloud (FSC), with strategic MuleSoft integration—leveraging Sales Cloud with IDP, DataGraph for Customer 360 views, and Composer for business user empowerment.

# Complex Integrations Simplified: Solid Platform Expertise

We help Salesforce AEs deliver seamless solutions by connecting disparate systems and creating unified ecosystems that drive end-to-end digital transformation. [Visit vantagepoint.io](vantagepoint.io) to explore our strong integration solutions.

Ready to discuss how our expertise can simplify your complex integrations and accelerate digital transformation? Schedule a meeting with David and Randy.

### Wealth & Asset Management

- Portfolio Management: Orion, Black Diamond, Tamarac, Addepar
- Financial Planning: eMoney, MoneyGuidePro, RightCapital
- Custodians: Schwab, Fidelity, Pershing, TD Ameritrade
- Fund Accounting: SS&C, Advent

### Insurance

- AMS: Applied Epic, Vertafore AMS360, Hawksoft
- Policy Administration: Duck Creek, Guidewire, Majesco
- Claims Management and Rating Engines

### Banking & Payments

- Core Banking: Jack Henry, FIS, Fiserv, Temenos
- Loan Origination: nCino, Encompass, Calyx Point
- Payment Rails: ACH, Wire, RTP, SWIFT
- Credit Bureaus: Equifax, Experian, TransUnion

### Core Business Systems

- Salesforce: All Core Clouds, FSC, Einstein, Agentforce
- Accounting: QuickBooks, NetSuite, Sage, Dynamics, SAP
- Document Management: DocuSign, SharePoint, Box

### Third-Party Data

- Open Banking: Plaid, Finicity, Yodlee
- Business Data: D&B, LexisNexis
- Property and Equipment Valuation
- Alternative Credit Data Sources
- Fraud Detection and Compliance Services

**Partnership Value:** Our strong Salesforce platform knowledge combined with MuleSoft integration capabilities accelerates digital transformation and delivers meaningful value across critical financial services use cases. Discover how we simplify complex integrations and drive digital transformation at vantagepoint.io.

To explore specific partnership opportunities and deep dive into our solutions, connect with David and Randy.

# Solving the Integration Paradox: Partnership for Client Growth

Growth-segment financial services face enterprise-level competitive pressures with constrained resources. Our strong Salesforce platform expertise, including Financial Services Cloud (FSC), with MuleSoft integration makes a significant difference.

### Technology Landscape

Clients navigate hybrid environments with legacy platforms and specialized SaaS applications. We unify these systems through Salesforce integration, eliminating data silos and operational inefficiencies.

### Resource Reality

Lean IT departments need solutions that achieve more with existing resources. Our Salesforce platform approach, including Financial Services Cloud (FSC), Agentforce and AI, enables teams to scale efficiently.

### Competitive Pressure

Customers expect instant, mobile-first, personalized experiences. Our expertise in Sales Cloud, Service Cloud, Marketing Cloud, and Financial Services Cloud (FSC) enables competitive digital experiences.

### Growth Imperative

Clients need technology for operational leverage and scalable growth. Solid Salesforce platform knowledge, including Financial Services Cloud (FSC), with MuleSoft provides the foundation for rapid deployment and competitive advantage.

**Partnership Value:** We empower Salesforce AEs to deliver meaningful value by implementing pragmatic strategies that leverage the entire Salesforce platform, including Financial Services Cloud (FSC), helping clients overcome resource constraints and achieve competitive advantage.
Visit vantagepoint.io for detailed case studies. Ready to discuss specific opportunities? Connect with David and Randy to explore how we can help your clients thrive: **Schedule a meeting with David and Randy**.

# Intelligent Automation with Salesforce & MuleSoft

We partner to bring practical expertise to high-impact automation initiatives, combining strong Salesforce platform knowledge with integration and AI capabilities. **Learn more about our robust automation solutions.** Ready to discuss specific opportunities? **Schedule time with David and Randy.**

## Intelligent Document Processing (IDP)

We leverage IDP extensively with MuleSoft, integrating directly with Salesforce Sales Cloud, Service Cloud, and Financial Services Cloud (FSC) to transform document-intensive processes:

- **Banking:** Driver's licenses, tax forms, financial statements, loan applications
- **Insurance:** Applications, medical records, claims photos, repair estimates
- **Wealth Management:** Account opening, investment applications, trust documents
- **Lending:** Pay stubs, W-2s, bank statements, tax returns, property titles

IDP enables straight-through processing, reducing multi-day manual efforts to same-day automated workflows within the Salesforce ecosystem.

## Strategic RPA and AI Solutions

While API-led connectivity through MuleSoft is foundational, RPA plays a pragmatic role extending Salesforce platform reach:

- Bridging legacy systems lacking modern APIs
- Automating data extraction to populate Salesforce records
- Building hybrid solutions combining RPA with API integration
- Facilitating screen scraping for Salesforce updates
- Automating reconciliation processes for real-time Salesforce insights
- Integrating advanced AI for enhanced insights and intelligent customer interactions

01

### Streamlined Loan Processing

Automated document extraction and validation enabling faster approvals within Salesforce Financial Services Cloud (FSC).

02

### Insurance Application Processing

Multi-line document handling with automated risk assessment for quicker policy issuance through Service Cloud, Financial Services Cloud (FSC), and Agentforce.

03

### Accelerated Account Opening

Identity verification, KYC extraction, and automated setup for enhanced client onboarding within Salesforce Financial Services Cloud (FSC).

04

### Optimized Claims Processing

FNOL intake, damage assessment, and repair estimates to expedite resolution in Salesforce Service Cloud and Financial Services Cloud (FSC).

05

### Financial Statement Analysis

Automated spreading and analysis feeding directly into Salesforce Financial Services Cloud (FSC) for comprehensive client views.

For detailed case studies on these automated workflows and other success stories, visit **vantagepoint.io**.

**Our Promise:** Transparent collaboration sharing best practices and success stories, leveraging the full Salesforce platform alongside strategic automation for significant operational efficiency. **Schedule time with David and Randy to explore partnership opportunities.**

# End-to-End Salesforce and MuleSoft Expertise

We're an extension of your team, partnering with Salesforce AEs to deliver solid client success through strong platform expertise spanning Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, AI solutions, and MuleSoft integration. Ready to explore a partnership? [Schedule time with David and Randy].

### Unified Vision

Shared understanding of goals, roles, and communication with proactive updates and transparent progress across all Salesforce projects.

### Collaborative Workflows

Seamless integration across Sales Cloud, Service Cloud, Marketing Cloud, and Financial Services Cloud (FSC) teams with unified project planning.

### Flexible Engagement

Adaptable to lead, support, or augment specific skill sets, complementing strengths for stronger joint solutions.

### Trusted Extension

Natural team extension representing both Vantage Point and Salesforce with consistent professionalism and shared excellence.

### Proactive Communication

Transparent dialogue with consistent updates and immediate challenge identification for realistic, effective solutions.

Interested in a collaborative discussion about your specific needs? [Connect with David and Randy today.]

**Partnership Advantage:** Solid expertise ensuring projects thrive, stakeholders remain aligned, and clients achieve strong end-to-end results that elevate both organizations. [Visit vantagepoint.io for detailed case studies and partnership insights]. Ready to turn these insights into action? [Schedule a meeting with David and Randy] to discuss how we can elevate your organization.

VANTAGE POINT

# Building Reusable Integration Assets

We build strategic, reusable business assets by architecting integration platforms that combine strong Salesforce expertise with MuleSoft proficiency, leveraging Agentforce and AI solutions.

### System APIs (Unlocking Data)

APIs connecting directly to core systems, exposing data in standardized formats as reusable foundation assets for Salesforce Clouds, including Financial Services Cloud (FSC).

*Examples: Core Banking API, AMS API, Portfolio Management API*

### Process APIs (Orchestrating Logic)

APIs orchestrating business processes across systems, encoding business rules for reusable capabilities within Salesforce workflows.

*Examples: Customer Onboarding API, Loan Application API, Claims Processing API*

### Experience APIs (Tailoring Delivery)

APIs formatting data for specific channels, optimizing Salesforce data delivery and decoupling front-end innovation from back-end stability.

*Examples: Mobile Banking API, Advisor Dashboard API, Partner Portal API*

## Partnership Value

This approach means subsequent Salesforce projects are more efficient and impactful, harnessing the power of Salesforce investment and accelerating innovation.

**Growth Strategy:** Start with focused, high-impact projects demonstrating immediate value, then progressively expand by reusing existing capabilities across both Salesforce platform and integration layers.

**Success Example:** Wealth management client began with portfolio integration into Sales Cloud, Financial Services Cloud (FSC), reused custodian APIs for Service Cloud expansion, then launched new Agentforce-powered client portal—now launching capabilities in weeks instead of months. Visit [vantagepoint.io]() for detailed case studies on our integration success.

Ready to explore how reusable integration assets can transform your Salesforce projects? [Schedule time with David and Randy]() to discuss specific opportunities.

# Retail Banking & Credit Union Success

## Strong Salesforce Platform (including Financial Services Cloud) & Integration Knowledge

Partnering with Salesforce to modernize banking around core systems, delivering Customer 360 views and digital experiences through solid platform knowledge. Ready to discuss specific opportunities? [Schedule time with David and Randy] to explore how we can drive your success.

**1**

### Digital Account Opening Platform

**Challenge:** Fragmented experiences, multi-day delays, high abandonment rates, data inconsistency.

**Solution:** Salesforce Experience Cloud and Financial Services Cloud (FSC) for seamless front-end, MuleSoft IDP for automated verification, Anypoint Platform connecting core banking and Financial Services Cloud, DataGraph for unified views, AI for fraud detection.

**Impact:** Same-day account opening, reduced abandonment, increased digital acquisition, improved staff productivity, rapid new account type launches.

**2**

### Core Banking Integration

**Challenge:** Data trapped in core platforms, manual processes, limited customer views, innovation barriers.

**Solution:** API-led integration with MuleSoft wrapping existing core, System APIs for real-time data, bi-directional sync with Financial Services Cloud (FSC), AI insights from integrated data.

**Impact:** True 360-degree customer views, eliminated manual entry, digital banking foundation, unlocked core system value.

**3**

### Customer Onboarding Automation

**Challenge:** Manual paper-based processes, duplicate data entry, poor experiences, limited scalability.

**Solution:** Automated workflow from application through funding, orchestrated data flow between Salesforce (including Financial Services Cloud), KYC services, e-signature platforms, and core banking using MuleSoft.

**Impact:** Onboarding in minutes, reduced operational costs, consistent compliance, scalable processes.

**4**

### Branch Network Optimization

**Challenge:** Staff time on document processing, slow branch profitability, limited performance visibility.

**Solution:** MuleSoft IDP for centralized processing, Composer for branch workflows, Anypoint Platform connecting branches to core, Agentforce in Service Cloud and Financial Services Cloud (FSC), AI for branch analytics.

**Impact:** New branches with fewer staff, higher-value sales activities, increased deposits per branch, faster profitability.

Ready to take the next step in modernizing your banking operations? [Connect with David and Randy] for a personalized discussion and to explore detailed case studies into our banking modernization strategies.

# Commercial Banking & Lending Solutions

## Loan Origination & Treasury Management

Transforming lending operations from manual processes into streamlined, competitive offerings through proven Salesforce platform and MuleSoft expertise.

### Small Business Lending Platform

**Challenge:** Manual underwriting limits capacity, no accounting software integration, inability to verify business information automatically.

**Solution:** Salesforce Sales Cloud and Financial Services Cloud (FSC) for lead management, Einstein AI for risk assessment, MuleSoft IDP for financial statement analysis, Anypoint Connectors for QuickBooks/Xero, Flex Gateway for partner channels.

**Impact:** Significant increase in processing capacity, direct business integration, partner channel contribution, notably reduced cost per loan.

### Loan Origination Automation

**Challenge:** Complex document-intensive processes, manual handoffs, long processing cycles, disconnected systems.

**Solution:** End-to-end automation with Financial Services Cloud as central hub, MuleSoft IDP for document extraction, real-time credit bureau connections, Service Cloud for applicant communication.

**Impact:** Processing time from weeks to days/hours, increased capacity without additional headcount, reduced errors, improved speed advantage.

### Commercial Real Estate Platform

**Challenge:** Complex CRE documentation, no property management integration, manual market research, inconsistent risk assessment.

**Solution:** MuleSoft IDP for rent roll analysis, Einstein AI for market analysis, Anypoint Platform integration with property management systems, DataGraph for unified property views.

**Impact:** Considerably reduced processing time, increased underwriting capacity, substantial growth in annual origination, new property type capabilities.

### Treasury Management Platform

**Challenge:** Lengthy client onboarding, no ERP integration, manual cash reporting, limited payment automation.

**Solution:** Sales Cloud, Financial Services Cloud (FSC) for client acquisition, Service Cloud for self-service portal, Marketing Cloud for education, MuleSoft integration with client ERP systems and payment networks.

**Impact:** Onboarding time from weeks to days, improved win rates in competitive takeovers, notable client base expansion, reduced support calls.

Ready to discuss specific opportunities or explore potential partnerships? [Schedule time with David and Randy] to connect directly.

For detailed case studies and more information on our solutions, [visit vantagepoint.io].

VANTAGE POINT

# Insurance Transformation with Salesforce

### Leveraging Sales Cloud, Service Cloud, Agentforce & MuleSoft for P&C Insurance

Connecting operational systems with Salesforce's customer engagement capabilities for unified, intelligent experiences.

Ready to discuss specific opportunities and explore how these solutions can transform your business? Schedule time with David and Randy today!

## AMS Integration

**Challenge:** Data trapped in AMS, disconnected from CRM, "swivel chair" work, incomplete customer views.

**Solution:** Bridge AMS platforms with the full Salesforce platform including Sales Cloud, Service Cloud, Financial Services Cloud (FSC), and Agentforce. MuleSoft RPA for legacy systems with strong API connectivity for modern platforms.

**Impact:** Solid Customer 360 views, eliminated manual data entry, enhanced producer productivity, improved cross-sell identification. Visit vantagepoint.io for detailed case studies to learn more about our solutions, or schedule a meeting with David and Randy to explore partnership opportunities.

## Multi-Line Product Platform

**Challenge:** Carriers wanting to expand into new lines but lacking reusable infrastructure. Traditional product launches take years.

**Solution:** Composable insurance platform on Anypoint Platform leveraging Financial Services Cloud (FSC) with reusable APIs for rating, underwriting, policy administration. MuleSoft IDP for multi-line processing.

**Impact:** Ability to launch multiple new product lines annually, strong premium revenue growth, quicker underwriting profitability, numerous MGA partnerships. Discover more about our composable insurance platforms at vantagepoint.io. Connect with David and Randy to discuss how our platform can accelerate your product launches: Schedule your meeting here.

1

### Policy Administration Automation

Streamlined workflows from application to policy issuance leveraging Salesforce Flow, Financial Services Cloud (FSC), and Experience Cloud. MuleSoft IDP extracts application data while real-time connections to data enrichment services ensure accuracy within Salesforce. Learn more about our policy automation solutions. Have questions or want to dive deeper? Schedule time with David and Randy.

2

### AI-Powered Claims Platform

Salesforce Service Cloud, augmented by Financial Services Cloud (FSC) capabilities, with AI centralizes claims processes. MuleSoft IDP automates FNOL processing and damage assessment. Einstein AI helps power fraud detection and settlement recommendations, reducing cycle time from weeks to days. Explore our AI-powered claims expertise at vantagepoint.io. Ready for an in-depth conversation? Connect with David and Randy.

3

### Small Commercial Automation

Salesforce Sales Cloud, Service Cloud, and Financial Services Cloud (FSC) provide a robust platform for small commercial accounts. Anypoint Platform integrates business data providers, MuleSoft IDP enables straight-through processing, Composer allows business rule configuration. Find out more at vantagepoint.io. For a personalized discussion on your commercial automation needs, schedule a meeting with David and Randy.

VANTAGE POINT

# Life & Health Insurance Growth

## Accelerating New Business & Underwriting

Transforming traditionally slow underwriting processes into competitive advantages through strong Salesforce platform knowledge and MuleSoft integration.

### New Business Processing

Salesforce Sales Cloud, Service Cloud, and Financial Services Cloud (FSC) manage the application lifecycle. MuleSoft IDP automates medical records and financial statement extraction. Intelligent workflows route cases efficiently, enhanced by Agentforce.

**Success:** Noticeable reduction in issuance time, improved agent and customer satisfaction through Salesforce platform transparency and speed. Learn more at vantagepoint.io.

Ready to discuss specific opportunities? Connect with David and Randy.

### Accelerated Underwriting

Real-time connections to alternative data sources integrated into Financial Services Cloud (FSC). Risk assessment engines within Financial Services Cloud (FSC), leveraging Salesforce Flow and AI solutions, enable straight-through processing for qualifying applications.

**Success:** Robust instant-issue capabilities, enhanced underwriting quality through AI-driven insights, increased placement rates, reduced abandonment. Visit vantagepoint.io for detailed case studies.

Schedule time with David and Randy to explore partnership opportunities: Book a meeting.

### Medicare Advantage Acceleration

Anypoint Platform integrates CMS systems, eligibility services, pharmacy networks centralized in Service Cloud, Marketing Cloud, and Financial Services Cloud (FSC). MuleSoft IDP automates enrollment processing while RPA handles legacy systems.

**Success:** Process substantially more enrollments during AEP, significant membership growth, reduced enrollment errors, faster eligibility verification. Explore more at vantagepoint.io.

Want to learn more? Schedule a conversation with David and Randy.

# Wealth Management & Advisory Solutions

## Portfolio Management Integration & Advisor Productivity

Creating unified advisor workstations and automating client servicing workflows through solid Salesforce platform and MuleSoft knowledge.

### Portfolio Management Integration

**Opportunity:** Critical portfolio data trapped in disparate systems like Orion, Black Diamond, Tamarac. Advisors lose valuable time accessing multiple platforms.

**Solution:** Integrate portfolio management systems with Salesforce Financial Services Cloud (FSC), Sales Cloud, and Service Cloud. Real-time data flows for holdings, performance, transactions, unified dashboards with AI-driven insights.

**Success:** True Customer 360 views, significantly improved advisor productivity, enhanced client service through better-informed conversations. Learn more at vantagepoint.io.
Ready to enhance your client service? Connect with David and Randy to discuss a tailored solution.

### RIA Rollup Integration

**Opportunity:** RIA aggregators face significant integration hurdles when acquiring firms. Traditional approaches take months with manual account transfers.

**Solution:** Robust integration framework on Anypoint Platform connecting custodians, portfolio management, Salesforce Financial Services Cloud (FSC) CRM, and billing. MuleSoft IDP for automated transfers, DataGraph for unified views.

**Success:** Accelerate integration from months to weeks, complete more acquisitions annually, substantial AUM growth with reusable framework. Visit vantagepoint.io for detailed case studies.
Looking to accelerate your acquisition strategy? Schedule time with David and Randy to explore partnership opportunities.

### Alternative Investment Launches

**Opportunity:** New alternative investment funds slowed by fund administration setup, manual subscription processing, complex regulatory reporting.

**Solution:** Anypoint Platform integrates fund ecosystem players, MuleSoft IDP automates subscriptions and accreditation, DataGraph enables advanced investor portals surfaced in Salesforce Financial Services Cloud (FSC).

**Success:** Reduced fund launch time, faster market responsiveness, additional AUM growth, potential first-mover advantage in emerging categories. Explore our expertise at vantagepoint.io.
Interested in faster fund launches? Connect with David and Randy to discuss your alternative investment strategy.

01

### High-Net-Worth Client Acquisition

Digital onboarding portal with MuleSoft IDP, connecting custodians, portfolio management, financial planning tools, and Salesforce Financial Services Cloud (FSC) with Marketing Cloud for personalized engagement and AI for predictive analytics. Discover our solutions for client acquisition at vantagepoint.io.
Ready to discuss your client acquisition strategies? Schedule a meeting with David and Randy.

02

### Global Wealth Platform Expansion

Anypoint Platform integration with global custodians, tax reporting, compliance databases, FX providers. MuleSoft IDP automates multi-jurisdiction KYC and tax documentation orchestrated through Salesforce Financial Services Cloud (FSC). Find out more about global expansion strategies at vantagepoint.io.
Planning global expansion? Connect with David and Randy to explore platform solutions.

03

### Hybrid Robo-Advisor Capabilities

API-first architecture connecting portfolio management, rebalancing engines, custodians, payment processors into Salesforce Financial Services Cloud (FSC) platform with AI-driven personalization and automated servicing. See how we implement hybrid robo-advisor solutions at vantagepoint.io.
Want to implement hybrid robo-advisor solutions? Schedule time with David and Randy to discuss.

# Consumer Lending & Fintech Innovation

## Point-of-Sale Lending, Digital Platforms & Fintech Solutions

Building flexible, scalable lending infrastructure through strong Salesforce platform knowledge and MuleSoft integration.

### Point-of-Sale Lending Platform

**Opportunity:** Manual merchant onboarding, complex e-commerce integrations, slower loan decisions potentially leading to missed partnerships and cart abandonment.

**Solution:** Salesforce Sales Cloud, Financial Services Cloud (FSC) for merchant relationships, Service Cloud for support, Anypoint Platform integrating e-commerce and payment processors, MuleSoft IDP for merchant verification, Flex Gateway for checkout APIs, AI for merchant scoring and fraud detection.

**Success:** Increased merchant onboarding, substantial partner base growth, faster loan decisions, and improved annual originations.

Visit vantagepoint.io for detailed case studies. Ready to discuss specific Point-of-Sale lending opportunities or potential partnerships? Schedule time with David and Randy.

### Gig Economy Lending

**Opportunity:** Serving the growing gig workforce with non-standard income verification challenges and diverse platform integrations.

**Solution:** Service Cloud for borrower support, Sales Cloud, Financial Services Cloud (FSC) for platform partnerships, Anypoint Platform integrating gig platforms and open banking APIs, MuleSoft IDP for bank statement parsing, AI for enhanced credit scoring on diverse income streams.

**Success:** Ability to tap into the gig economy market, increased approval rates, solid loan book growth, and potentially lower default rates through improved cash flow analysis.

Learn more at vantagepoint.io. Interested in serving the gig economy? Connect with David and Randy to explore solutions.

### Buy Now Pay Later Platform

**Opportunity:** Launch BNPL products with rapid approval to compete effectively. Navigate complex e-commerce integrations and manage fraud detection.

**Solution:** Service Cloud for customer support, Marketing Cloud for user engagement, Salesforce Financial Services Cloud (FSC) platform for merchant relationships, Anypoint Platform with real-time e-commerce integration, MuleSoft IDP for rapid verification, AI for fraud detection.

**Success:** Launch BNPL in months rather than years, process a high volume of applications daily, solid GMV, and good conversion to higher-margin products.

Visit vantagepoint.io for more information. Looking to launch or enhance your BNPL platform? Schedule a meeting with David and Randy.

### Student Loan Refinancing

**Opportunity:** Manual verification processes, limited loan servicer integration, and elevated operational costs potentially leading to slower processing and customer abandonment.

**Solution:** Sales Cloud, Financial Services Cloud (FSC) for lead management, Service Cloud for customer service, Anypoint Platform integrating verification services and loan servicers, MuleSoft IDP for automated verification, AI for document review and personalized offers.

**Success:** Increased monthly origination capacity, streamlined processing, lower cost per loan, and the ability to gain market share.

Learn more about our solutions at vantagepoint.io. Want to streamline your student loan refinancing process? Connect with David and Randy to explore how we can help.

VANTAGE POINT

# Commercial & Specialty Finance Capabilities

## Equipment Finance, Invoice Factoring & Asset-Based Lending

Scaling operations and geographic expansion through collaborative integration solutions and strong Salesforce expertise.

### 1 Equipment Finance National Expansion

**Challenge:** Manual credit analysis limits expansion, no dealer integrations in new markets, complex UCC filing across states.

**Solution:** Sales Cloud for dealer relationships, Service Cloud for support, Marketing Cloud for partner engagement, Financial Services Cloud (FSC) for clear client views, integrated with valuation services and UCC systems via Anypoint Platform. MuleSoft IDP automates financial analysis and UCC processing.

**Success:** Geographic expansion from regional to national with existing teams, multiple new equipment verticals, significant portfolio growth, reduced credit decisions from days to hours. **Learn more at vantagepoint.io**. Ready to discuss how we can help your expansion? **Schedule time with David and Randy.**

### 2 Invoice Factoring Platform

**Challenge:** Manual invoice verification limits volume, no client accounting integration, slow funding timelines, complex reserve processes across hundreds of clients.

**Solution:** Sales Cloud for client relationships, Marketing Cloud for acquisition, Service Cloud for dispute resolution, Financial Services Cloud (FSC) for strong client management, Anypoint Platform integrating accounting platforms, MuleSoft IDP for invoice validation, Flex Gateway for client APIs.

**Success:** Process a higher volume of invoices monthly, substantial client base growth, funding reduced from days to same-day, significantly reduced acquisition costs. **Learn more at vantagepoint.io**. Want to optimize your factoring platform? **Connect with David and Randy.**

### 3 Asset-Based Lending Intelligence

**Challenge:** Manual borrowing base processing limits portfolio size, no borrower ERP integration, infrequent monitoring insufficient for risk management, complex covenant tracking.

**Solution:** Sales Cloud for borrower relationships, Service Cloud for support, Marketing Cloud for outreach, Financial Services Cloud (FSC) for streamlined borrower operations, connecting borrower ERP systems via Anypoint Platform, MuleSoft IDP automates BBC analysis, DataGraph provides unified portfolio views, capable AI for predictive analytics.

**Success:** Monitor more borrowers with existing teams, increase monitoring frequency to weekly/real-time, new collateral types, improved portfolio performance, strong ABL book growth. **Learn more at vantagepoint.io**. Explore ABL intelligence for your business. **Schedule a meeting with David and Randy.**

# Salesforce Platform & Fintech Solutions

## Leveraging Salesforce, Agentforce, AI & MuleSoft for Financial Services

Robust solutions combining strong Salesforce platform knowledge—Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, and AI—with effective MuleSoft integration for innovation and enhanced customer experiences.

### Payment Orchestration Platform

**Opportunity:** Navigate complexities of multiple payment methods, diverse protocols, and evolving options while providing a unified view within Salesforce.

**Solution:** Unified payment orchestration layers using MuleSoft connecting to Salesforce Clouds, System APIs for each payment rail, intelligent routing designed for cost-effectiveness, speed, and reliability, real-time monitoring with Salesforce AI-supported fraud detection.

**Success:** Flexibility for new payment methods, effective intelligent routing, streamlined operations with unified Salesforce monitoring, improved customer experience through reliable processing.

Learn more at **vantagepoint.io**

Ready to discuss specific opportunities? Connect with David and Randy **here**.

### Banking-as-a-Service Enablement

**Opportunity:** Fintechs need core banking functionality without becoming banks. Legacy core integration challenges and consistent API layers for Salesforce ecosystem innovation.

**Solution:** Standardized API layers with MuleSoft exposing sponsor bank functionality, integration with diverse core banking systems enabling expedited fintech development through clean APIs powering Salesforce Sales Cloud, Service Cloud, Financial Services Cloud (FSC), and Agentforce solutions.

**Success:** Significantly accelerated fintech time-to-market on Salesforce, effectively reduced integration costs, strategic flexibility in sponsor relationships, a scalable foundation for product portfolio growth.

Learn more at **vantagepoint.io**

Schedule time with David and Randy to explore these and other collaboration opportunities **today**.

### Open Banking & API Banking

**Opportunity:** Meeting regulatory requirements, exposing banking functionality through secure APIs, integrating legacy systems while addressing security and compliance.

**Solution:** Secure API layers with MuleSoft connecting to Salesforce for enriched customer profiles, solid security through Salesforce Shield, bridging legacy and modern API standards enabling compliant data sharing and new Salesforce capabilities.

**Success:** Strong compliance with open banking regulations, new revenue streams via API banking and enhanced Salesforce capabilities, strategic fintech collaborations, secure API gateway protection.

Learn more at **vantagepoint.io**

Interested in a deeper dive? Schedule a meeting with David and Randy **here**.

# Mortgage Lending Excellence

## Loan Origination & Servicing Automation

Modernizing origination workflows and elevating borrower experiences in this document-intensive segment through proven Salesforce platform integration expertise.

### Streamlined Mortgage Origination

**Challenge:** Complex document-heavy processes, integration challenges between CRM/LOS systems, manual document gathering consuming excessive time, lengthy origination cycles, thorough auditable documentation requirements.

**Solution:** Effective Salesforce platform utilization—Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud, Agentforce—connecting with mortgage LOS platforms for efficient data flow. Automated connections to credit bureaus, appraisal management, title companies via MuleSoft. IDP integrated with Salesforce for automated document extraction from pay stubs, W-2s, bank statements, tax returns, appraisals. AI-driven automation within the platform for improved processes.

**Success:** Reduced origination cycle times, improved borrower experience through transparency and speed, operational efficiency with effective Salesforce workflows, solid compliance posture with thorough documentation, valuable competitive advantage where speed impacts conversion rates.

Visit vantagepoint.io for detailed case studies on mortgage origination success.

Ready to explore how to streamline your mortgage origination? **Schedule time with David and Randy** to discuss specific opportunities.

### Enhanced Point-of-Sale Experience

**Challenge:** Borrowers expect quick pre-approvals and precise rate quotes. Manual processes create friction when speed is critical. Disconnected point-of-sale tools and back-office LOS create data gaps.

**Solution:** Connect point-of-sale platforms with LOS and core systems in near real-time leveraging Salesforce Sales Cloud, Service Cloud, and Financial Services Cloud. Quick credit pulls and automated initial underwriting. Agentforce capabilities and AI solutions support decision-making, efficient handoffs from self-service to loan officers, integration with realtor/builder systems.

**Success:** Quick pre-approvals meeting modern expectations, improved conversion rates from lead to application, enhanced borrower satisfaction through a digital-first experience, stronger referral partnerships, a solid competitive advantage in the digital-first mortgage market.

Learn more about our digital mortgage solutions at vantagepoint.io.

Ready to discuss specific opportunities for an enhanced point-of-sale experience? **Connect with David and Randy**.

VANTAGE POINT

# Credit Union Success

## Enhancing Member Experience & Community Banking Excellence

Addressing unique credit union challenges: balancing member-centric focus with digital innovation needs, often on limited budgets, through solid Salesforce platform expertise.

### Member Experience Transformation

**Opportunity:** Credit unions compete with large banks and well-funded fintechs on member experience with constrained technology budgets. They need to maintain personal, relationship-focused touch while offering digital convenience expected by members.

**Solution:** Member-facing digital experiences using the full Salesforce platform—Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC)—powered by integrated backend systems through MuleSoft. Preserve personal relationship model while adding essential digital convenience. Leverage Salesforce AI for personalized member insights and automated engagement. Projects with positive impact and clear ROI building foundational capabilities.

**Success:** Competitive digital experiences reinforcing relationship advantages, budget-conscious solutions with good ROI, staff empowered for member service focus, enhanced member satisfaction through an effective blend of personal service and digital convenience.

Ready to discuss specific opportunities? Connect with David and Randy to explore how we can help achieve your credit union's goals. **Schedule your meeting**.

### Branch Network Modernization

**Opportunity:** Evolving branch roles from transactional to advisory centers. Staff need complete member insights for meaningful conversations. Current systems can sometimes lack deep digital channel integration creating inconsistent experiences.

**Solution:** Integrate branch platforms with core systems and Salesforce CRM leveraging Sales Cloud, Service Cloud, Financial Services Cloud (FSC), and Agentforce for unified staff workstations. Solid member 360 views enabling personalized advice. Improved member journeys across channels. Automated routine transactions using Salesforce capabilities and MuleSoft integration freeing staff for advisory interactions.

**Success:** Branches evolved into relationship-focused advisory centers, staff equipped with comprehensive information for valuable member conversations, streamlined omnichannel member experiences providing strong differentiation from competitors, enhanced member loyalty through improved service, optimized branch networks with strategic value propositions.

Schedule time with David and Randy to discuss how these strategies can benefit your credit union and enhance your member experience. **Book a meeting**.

# Seamless Compliance & Client Success

Empowering financial services clients to navigate complex regulatory landscapes with extensive Salesforce platform knowledge, streamlining compliance and unlocking efficiency.

01

### Collaborative Data Integration

Build robust integrations leveraging Salesforce's robust data model ensuring complete, real-time data flows. Regulatory reports powered by consistent, validated data with clear audit trails.

02

### Transparent Audit Trails

Salesforce native capabilities for detailed, immutable logging capturing every interaction across Sales Cloud, Service Cloud, Financial Services Cloud (FSC), and platform components for regulatory examinations and internal reviews.

03

### Standardized Workflows

Process APIs embed compliance requirements into automated workflows within Salesforce ensuring consistent policy application. Configuration-driven updates as regulations evolve.

04

### Proactive AI Monitoring

Integrated systems including Salesforce reporting and AI solutions enable real-time compliance monitoring with proactive issue identification and custom dashboards for continuous oversight.

For a deeper dive into our compliance solutions and expertise, **schedule time with David and Randy**.

### Banking

- BSA/AML transaction monitoring
- Reg E compliance for electronic transactions
- HMDA reporting for mortgage lending
- Right of rescission tracking
- SAR preparation with detailed data

### Insurance

- E&O risk reduction through consistent processes
- State regulatory reporting
- Producer licensing and appointment tracking
- Market conduct compliance
- Claims handling compliance

### Wealth Management

- Form CRS delivery tracking
- Suitability and best interest documentation
- Custody rule compliance
- SEC/FINRA examination readiness
- Trade surveillance and supervision

Explore how our tailored Salesforce solutions can support your compliance efforts and drive client success. **Ready to discuss specific opportunities? Connect with David and Randy**.

# Success Story: Wealth Management Transformation

## Creating the Unified Advisor Workstation

**Client:** Mid-sized RIA managing substantial assets across multiple states. Growing advisor team and expanding client base creating operational strain from disconnected systems limiting technology effectiveness.

### 1 The Challenge

Advisors spending excessive time toggling between portfolio management, financial planning software, CRM, and custodian portals. Meeting preparation consumed hours gathering information from disparate sources. During meetings, advisors couldn't easily access complete information, creating awkward pauses and missed cross-sell opportunities due to limited visibility into complete client relationships.

### 2 Extensive Salesforce Transformation

**Phase 1:** Foundation with Financial Services Cloud & Sales Cloud—architected core advisor workstation with MuleSoft integration connecting portfolio management for real-time data flows within the Salesforce platform.

**Phase 2: Financial Services Cloud (FSC)** with Service Cloud & AI enhancement—integrated financial planning software, deployed Service Cloud for case management, introduced AI-driven insights for personalized advice, all within the proven framework of FSC.

**Phase 3:** Agentforce & automation—standardized custodian connections, automated account opening workflows, implemented Agentforce for compliance processes and client interactions, further leveraging the capabilities of **Financial Services Cloud (FSC)**.

**Phase 4:** Marketing Cloud & digital experience—developed client-facing portal with integrated backend data, synchronized with Marketing Cloud for personalized communications, building on the foundation provided by **Financial Services Cloud (FSC)**.

### 3 Shared Success

Advisors now operate from single, unified Salesforce platform with solid client information. Significantly reduced meeting preparation time allowing more client focus. Client conversations became more holistic and value-focused with strong data and AI-driven insights. Improved cross-sell identification and client satisfaction scores. Easier new advisor onboarding due to simplified technology, creating a recruiting advantage through solid end-to-end Salesforce platform integration, centered around **Financial Services Cloud (FSC)**.

Ready to see how a similar transformation can benefit your organization? [Schedule time with David and Randy] to discuss your specific needs.

Discover more success stories and our financial services solutions at [vantagepoint.io].

> "The integration transformed how our advisors work. They're spending more time with clients and less time searching for information. The unified view meaningfully changed how we operate—we're more proactive, thorough, and efficient."

We'd love to discuss how we can empower your financial institution. [Connect with David and Randy] for a personalized consultation.

# Success Story: Insurance Agency Transformation

## Increasing Salesforce Platform Potential

**Client:** Growing P&C insurance agency with multiple producers, significantly invested in Salesforce CRM but struggling to realize more value due to disconnect between Applied Epic AMS and Salesforce creating data silos and limited producer adoption.

### The Challenge

Substantial Salesforce investment with lagging adoption because critical policy data resided solely in AMS. Producers faced duplicate data entry making Salesforce feel like an extra step rather than a central hub. This led to underutilized CRM jeopardizing Salesforce initiative success. Goal was leveraging strong Salesforce platform knowledge with MuleSoft integration capabilities to leverage the platform's power.

### Effective Salesforce Solution

**Phase 1:** Core Sales Cloud, Service Cloud, and Financial Services Cloud (FSC) integration—established as key hubs for client interactions using MuleSoft to integrate Applied Epic, creating automated data flows transforming Salesforce into a robust, real-time command center.

**Phase 2:** Agentforce and AI enablement—deployed Agentforce to streamline agent workflows, implemented AI-driven insights for proactive policy renewal risks and cross-sell opportunities.

**Phase 3:** Automated workflows—synchronized service activities bidirectionally across platform, built effective renewal workflows and strategic cross-sell identification.

**Phase 4:** Enhanced insights—developed executive dashboards offering improved visibility into book composition, renewal pipelines, and producer performance across Sales, Service, Marketing, and Financial Services Cloud (FSC) efforts. Learn more about our platform capabilities at vantagepoint.io.

### Mutual Success

Producer adoption shifted from hesitant to more engaged. Eliminating duplicate data entry and providing a complete client view made Salesforce highly valuable for daily work. Cross-sell rates improved through systematic opportunity identification. Renewal retention saw measurable gains through automated, personalized outreach. Management gained enhanced visibility and actionable insights. Project validated the Salesforce investment and established a foundation for future innovations, demonstrating a strong combination of Salesforce platform knowledge with effective integration capabilities. Visit vantagepoint.io for detailed case studies on similar transformations.

Ready to discuss specific opportunities or explore how we can empower your agency? **[Schedule time with David and Randy]**.

> "This integration turned our Salesforce investment from a question mark into a cornerstone of our operations. Our producers now champion Salesforce, finding it essential for their daily success. We're seeing tangible business growth through enhanced cross-selling and renewal management."

Connect with our experts: **[Schedule a meeting with David and Randy]** to explore how we can drive similar success for your business.

# Success Story: Community Bank Digital Transformation

## Digital Transformation Without Core Replacement

**Client:** Dedicated community bank serving local businesses and consumers across multiple counties. Long-standing Jack Henry core banking system with deep organizational knowledge. Facing competitive pressure from digital-first banks and fintechs with limited IT resources and budget constraints. Strong community relationships at risk due to evolving technology expectations.

### The Challenge

Retaining customers, particularly younger members and digitally-savvy small businesses, migrating to competitors offering enhanced digital experiences. Existing mobile and online banking capabilities felt basic and dated. Launching new features proved lengthy and expensive due to core system integration complexity. While recognizing urgent need to modernize for competitiveness, cost, risk, and operational disruption of core replacement were prohibitive. Staff efficiency impacted by disconnected systems requiring multiple logins and manual data reconciliation.

### Phased Salesforce Solution

**Phase 1:** Customer 360 with Financial Services Cloud (FSC) & MuleSoft—integrated Jack Henry Symitar core with Salesforce with a strong MuleSoft approach for robust, real-time, bi-directional data synchronization establishing solid Customer 360 views empowering branch staff, relationship managers, and customer service teams.

**Phase 2:** Automated account opening & digital engagement—automated new account workflow from digital application through core account creation including identity verification, e-signature platforms, document management, enhanced digital engagement with Marketing Cloud.

**Phase 3:** Enhanced digital banking & Agentforce—leveraging secure APIs for improved mobile banking features adding competitive capabilities like mobile deposit and P2P payments. Integrated Agentforce for unified agent desktop.

**Phase 4:** AI-powered loan processing—automated small business loan application processing end-to-end integrating credit bureau services, document management, loan accounting systems with Salesforce AI capabilities for streamlined decision-making and personalized interactions.

### Mutual Success

Bank now offers competitive, modern digital banking experiences without risky, expensive core replacement. Customer satisfaction scores improved noticeably across all demographics through enhanced digital interactions and personalized service. New account openings increased significantly as onboarding friction was reduced. Operational efficiency saw considerable improvements across multiple processes. Staff equipped with relevant customer information via Salesforce Sales, Service, and Financial Services Cloud (FSC) enabling solid service and targeted marketing. Loan processing capacity substantially increased without additional headcount leveraging AI for faster decisions. Technology transformed from competitive weakness into a competitive advantage.

Ready to transform your banking operations? Schedule time with David and Randy to discuss your digital transformation journey: [Schedule a Meeting]

Ready to unlock similar success? Connect with David and Randy to explore how we can help your organization: [Schedule a personalized discussion].

> "Vantage Point showed us we didn't need to replace our core to compete digitally. The API-led integration approach, combined with their strong knowledge of the Salesforce ecosystem, has positively impacted our banking operations. We're now innovating faster and delivering meaningful customer experiences."

# Our "Land and Expand" Approach

Building success together through practical, value-driven steps designed for real-world growth. Our approach leverages strong Salesforce platform knowledge—Sales Cloud, Service Cloud, Marketing Cloud, **Financial Services Cloud (FSC)**, Agentforce, AI solutions—combined with MuleSoft integration, minimizing risk and maximizing impact. Learn more about our approach at [vantagepoint.io](vantagepoint.io). Ready to discuss specific opportunities? [Schedule time with David and Randy.]()

### Phase 1: Joint Discovery

**Weeks 1-2:** Deep dive into existing systems and Salesforce ecosystem, understand integration landscape, pinpoint operational challenges. Collaborative stakeholder discussions mapping critical dependencies, identifying opportunities within Sales Cloud, Service Cloud, Marketing Cloud, **Financial Services Cloud (FSC)**, and Agentforce. Jointly prioritize use cases based on shared business value and strategic goals with clear, measurable success metrics including potential AI applications.

**Achievement:** Clear shared understanding of current Salesforce platform state, jointly developed realistic phased roadmap, defined scope for initial high-impact project, a solid business case with expected ROI, collaborative risk assessment with mitigation strategies.

### Phase 2: Shared Foundation

**Weeks 3-8:** Side-by-side establishment of foundational Salesforce data model and core cloud configuration. Leverage MuleSoft to build robust integration foundation connecting key systems with Salesforce for real-time data flow. Implement initial Process APIs for highest-priority use case supporting solutions like Agentforce. Establish strong security, monitoring, and governance frameworks with thorough documentation and knowledge transfer.

**Achievement:** Working Salesforce solution solving most critical challenge with demonstrable impact, reusable API foundation for future projects, clear ROI justifying continued investment, quick win building organizational momentum, established patterns and standards for future joint development.

### Phase 3: Collaborative Expansion

**Months 3-6:** Building on shared foundation, rapidly tackle additional use cases across Salesforce platform. Expand capabilities within Sales Cloud, Service Cloud, Marketing Cloud, **Financial Services Cloud (FSC)**, enhance Agentforce functionality, continuously expand data synchronization via MuleSoft. Add automation for more business processes within Salesforce, enhance user experiences with richer data, incorporating lessons learned from initial collaboration with continued knowledge transfer.

**Achievement:** Progressively expanding capabilities solving more business problems, each project becoming measurably faster and more cost-effective. Cumulative ROI compounding over time, growing application network and a strong Salesforce ecosystem becoming increasingly valuable, building organizational confidence in shared approach.

### Phase 4: Strategic Evolution

**Months 6+:** Trusted partners jointly exploring advanced use cases leveraging Salesforce Einstein AI/ML on integrated, unified data. Expand solutions to additional lines of business and departments within Salesforce ecosystem, optimize and refine existing integrations based on usage patterns. Deep knowledge transfer for internal sustainment of routine activities, ongoing strategic guidance for architecture and priorities across entire Salesforce platform supporting continuous innovation and optimization.

**Achievement:** A mature, integrated Salesforce platform functioning as a valuable strategic asset, fostering self-sufficiency for routine changes and maintenance. Partnership maintained for strategic initiatives and complex enhancements, a strong foundation for continuous innovation, competitive differentiation, confident competent end-to-end Salesforce platform capability within organization.

**Our Commitment:** Transparent progress reporting and proactive issue resolution ensuring constant alignment. Thorough knowledge transfer and documentation at every phase covering both Salesforce configuration and integration. Strict adherence to best practices for security, performance, and scalability across entire Salesforce platform. Honest, pragmatic guidance on priorities and approaches as truly collaborative partners focused on mutual success. Visit [vantagepoint.io](vantagepoint.io) to explore our solutions and commitment. Let's connect to discuss how our approach can benefit you: [Schedule time with David and Randy]().

VANTAGE POINT

# Enterprise-Grade Salesforce Solutions

Delivering solid, enterprise-grade solutions leveraging extensive Salesforce platform capabilities—Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC) with Agentforce capabilities—combined with MuleSoft integration expertise ensuring smooth data flow, strong security, and reliable performance.

### Security & Trust Across Salesforce

- Layered security protecting sensitive client data across all Salesforce clouds
- Regulatory adherence (GLBA, SOX, PCI-DSS, GDPR, CCPA) supporting compliance for financial services
- Fine-grained access controls and modern authentication protecting important information
- Comprehensive audit logging providing transparency and supporting compliance needs
- Threat protection, rate limiting, and DDoS mitigation supporting system integrity

### Scalable Growth & Speed

- Integrations designed to grow with clients, handling increasing transaction volumes across Sales Cloud, Service Cloud, Marketing Cloud, and Financial Services Cloud (FSC)
- Efficient response times for key customer-facing Salesforce applications
- Intelligent caching strategies optimizing Salesforce data performance while maintaining relevance
- Available solutions with load balancing and automatic failover for enhanced reliability
- Monitoring and optimization for a consistent user experience

### Dependable Operations

- Business continuity with effective retry logic and circuit breakers to help prevent Salesforce process disruptions
- Supporting data recovery with dead-letter queues for failed transactions allowing recovery for Salesforce data exchanges
- Error logging, categorization, and alerting across the Salesforce ecosystem to address issues effectively
- Systems designed for graceful degradation, maintaining key Salesforce functions if upstream systems are unavailable
- Automated alerting and escalation for important issues, supporting rapid incident response

### Smooth Data Flow & Quality

- Connecting diverse systems with MuleSoft, managing complex data mapping and various formats to/from Salesforce clouds
- Data integrity with validation, enrichment, and quality checks for data flowing into Sales Cloud, Service Cloud, Marketing Cloud, and Financial Services Cloud (FSC)
- Clear data lineage for audit trails and streamlined troubleshooting across integrated Salesforce systems
- Maintainable transformation logic for future adaptability within Salesforce and MuleSoft ecosystem

### Enhanced Visibility & Insights

- Dashboards showing integration health, performance, and usage for better understanding across Salesforce implementation
- Alerting for issues that need attention, keeping stakeholders informed about Salesforce and integrated systems status
- Analytics on integration usage patterns, performance trends, and capacity planning for the Salesforce platform
- Business process monitoring for end-to-end visibility including Agentforce workflows
- Custom dashboards tailored for different stakeholder audiences visualizing Salesforce performance and data

### Intelligent Automation & AI Innovation

- Leveraging MuleSoft RPA to integrate legacy systems during modernization, enhancing Salesforce workflows
- Implementing Intelligent Document Processing for automated data extraction feeding key data into Salesforce
- Integrating Salesforce AI/ML capabilities (Einstein) for predictive capabilities and informed decision-making within client workflows
- Orchestrating workflows across systems and people to streamline business processes within and around Salesforce
- Utilizing process mining to optimize operations based on actual usage patterns driving continuous improvement within the Salesforce platform

For detailed case studies and more information on how our solutions can empower your enterprise, visit **vantagepoint.io**. Ready to discuss specific opportunities and tailor these solutions to your needs? **Schedule time with David and Randy**.

VANTAGE POINT

# Why Growth Segment Firms Choose Us

## Built for Your Reality, Not Enterprise Assumptions

We specialize exclusively in serving growth-segment financial services firms, bringing strong Salesforce platform knowledge—Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), and core capabilities—combined with MuleSoft integration capabilities. Learn more about our specialized solutions at vantagepoint.io.

Ready to discuss specific opportunities and how we can support your growth? Schedule time with David and Randy to connect.

### Understanding Your Constraints

**Budget Reality:** Solutions designed for realistic budgets leveraging full Salesforce platform power to deliver demonstrable ROI quickly funding subsequent phases. Significant use of pre-built accelerators reducing costs without compromising quality.

**Resource Limitations:** Specialized expertise you don't have in-house with dedicated support without full-time hires. Leverage low-code capabilities across entire Salesforce platform reducing ongoing maintenance burden and freeing up your team.

**Risk Tolerance:** Avoid risky "big bang" approaches. Prove value incrementally with manageable, contained projects working carefully around production systems with rigorous testing ensuring smooth adoption.

### Unlocking Your Opportunities

**Competitive Pressure:** Compete effectively with digital-first competitors despite resource constraints. Leverage Sales Cloud, Service Cloud, Marketing Cloud, and Financial Services Cloud (FSC), bringing sophisticated capabilities often reserved for larger institutions, significantly accelerating innovation through reusable architecture.

**Growth Ambitions:** Solutions designed to scale elegantly with your growth trajectory. Create operational leverage enabling expansion without linear cost scaling, establishing foundations making subsequent projects progressively easier and faster across the Salesforce ecosystem.

**Customer Expectations:** Deliver omnichannel, real-time, personalized experiences by combining core Salesforce cloud functionality with robust integration enabling impactful personalization that builds lasting loyalty and lifetime value.

### Financial Services Focus

Solid understanding of your business models, economics, and challenges. Good knowledge of systems you use through many previous integrations across Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), and financial services-specific solutions like Agentforce and AI. Understanding of your unique regulatory environment and compliance requirements with proven best practices from across the industry. Relevant customer references in your specific vertical. Visit vantagepoint.io for detailed case studies.

### Collaborative Partnership

Every engagement approached as true collaboration focused on mutual success rather than territorial claims. Work hand-in-hand with Salesforce core teams across all clouds and other partners ensuring seamless integration and shared platform understanding. Diligently protecting both organizations' brands. Commitment to your long-term success, fostering a relationship as trusted advisors, not just transactional vendors.

Ready to foster a trusted partnership? Schedule time with David and Randy to discuss your long-term success.

# Understanding Integration & Salesforce Platform Economics

Clear definition of thorough Salesforce solution economics, focusing on mutual investments and shared returns, enabling confident collaborative decision-making built on strong platform knowledge. To dive deeper into Salesforce platform economics, visit **vantagepoint.io**.

Ready to discuss specific opportunities and how we can achieve shared returns? **Schedule time with David and Randy to explore your unique needs.**

### Strategic Asset Investment

Entire Salesforce platform including core clouds—Sales Cloud, Service Cloud, Marketing Cloud, and Financial Services Cloud (FSC)—and MuleSoft integration capabilities as strategic assets growing in value together. Each step builds reusable APIs and foundational platform components making every future project faster and more cost-effective. Initial investment creates a solid foundation with subsequent efforts yielding meaningful returns. Recognition of hidden costs of manual processes and collaborative ROI calculations reflecting long-term, shared value beyond immediate project returns.

### Proven Platform Expertise

Strong knowledge spanning the broad Salesforce ecosystem encompassing Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), and other core platform capabilities. Focused knowledge in emerging solutions like Agentforce and advanced AI solutions ensuring a future-proof investment. By combining platform understanding with MuleSoft integration capabilities, we deliver integrated, cohesive solutions tailored for financial services clients. We speak the language of your business and translate it into an effective, integrated Salesforce strategy. For more in-depth insights into our expertise, explore our resources at **vantagepoint.io**.

Explore how our expertise can benefit your firm directly. **Schedule time with David and Randy for a personalized discussion.**

## ROI Sources

**Operational Efficiency:**

- Save staff time eliminating manual data entry and "swivel chair" work
- Significantly reduce errors cutting correction costs and compliance risk
- Achieve noticeably faster process completion creating more capacity
- Enable substantial growth without proportional headcount increases

**Revenue Enhancement:**

- Better cross-sell and retention through complete customer visibility
- Accelerate deal closure with streamlined, friction-free processes
- Reduce customer attrition through markedly improved experiences
- Unlock new product and service capabilities through a reliable integration foundation

**Risk Reduction:**

- Improve compliance through consistent, auditable, automated processes
- Significantly reduce errors that could lead to regulatory issues and fines
- Improved decision-making through enhanced data quality
- Strengthen security through effective integration architecture

**Strategic Optionality:**

- Flexibility to change underlying systems without rebuilding everything
- Ability to rapidly adopt new technologies (AI/ML, new channels, emerging capabilities)
- Platform for continuous innovation driving competitive differentiation
- Facilitate M&A integration making acquisitions faster and more valuable

Discover detailed case studies on achieving measurable ROI at **vantagepoint.io**.

Ready to unlock these benefits for your firm? **Connect with David and Randy to discuss your specific ROI opportunities.**

**Shared ROI Timeline:** Our "land and expand" approach delivers measurable, demonstrable ROI within months, not years. Initial projects structured to largely pay for themselves through hard cost savings and efficiency gains, funding continued expansion together. Subsequent phases build on this foundation delivering progressively better returns.

**Building the Business Case:** We work closely to identify and carefully quantify specific ROI sources during discovery. Establish metrics and tracking mechanisms for ongoing, mutual measurement. Provide shared frameworks and templates for continuous value tracking and reporting ensuring effective value articulation to leadership, boards, and other stakeholders. For more resources, visit **vantagepoint.io**.

Looking to collaborate on building a robust business case? **Schedule time with David and Randy to initiate a discovery session.**

VANTAGE POINT

# Salesforce & MuleSoft Platform Expertise

Solid knowledge of the entire Salesforce platform, including **Financial Services Cloud (FSC)**, with effective MuleSoft integration capabilities, delivering valuable solutions that address unique challenges and support success.

### Salesforce Sales Cloud

**Partnership Focus:** Financial institutions focused on client acquisition, relationship management, and revenue growth with a cohesive sales process, often leveraging **Financial Services Cloud (FSC)** for industry-specific capabilities.

**Customer Value:** Optimize sales pipelines, manage client relationships effectively, automate sales processes to facilitate deal closure. Supports advisor productivity and improved client satisfaction.

**Opportunities:** Lead and opportunity management, client onboarding automation, wealth management engagement, mortgage origination tracking, sales performance analytics.

Discover how our Sales Cloud solutions support growth, or **schedule time with David and Randy to explore partnership opportunities**.

### Salesforce Service Cloud & Agentforce

**Partnership Focus:** Organizations seeking strong client service, streamlined support operations, and empowered service agents with a 360-degree view, often enhanced by **Financial Services Cloud (FSC)** for tailored financial customer engagement.

**Customer Value:** Personalized, efficient support across channels, contributing to reduced resolution times and enhanced agent productivity. Supports client retention and loyalty, which are important in financial services.

**Opportunities:** Multi-channel client support, call center optimization, claims processing, policy inquiries, proactive client outreach, legacy service system integration for a consistent agent experience.

Explore our Service Cloud success stories. Ready to discuss specific opportunities? **Connect with David and Randy**.

### Salesforce Marketing Cloud

**Partnership Focus:** Financial services clients needing personalized, data-driven marketing campaigns across the customer journey, often utilizing **Financial Services Cloud (FSC)** as a central hub for customer data.

**Customer Value:** Design impactful client journeys, automate marketing communications, and personalize experiences to foster strong relationships. Drives engagement, cross-sell opportunities, and brand loyalty.

**Opportunities:** Onboarding journey automation, personalized product recommendations, loyalty programs, compliance-driven communications, integrated campaigns for wealth management or insurance products.

Learn more about our marketing expertise and solutions. To dive deeper, **schedule a meeting with David and Randy**.

### Core Salesforce Platform

**Partnership Focus:** Clients needing to extend Salesforce with custom applications, integrate specific financial processes, or build industry-relevant solutions, such as those built upon or integrated with **Financial Services Cloud (FSC)**.

**Customer Value:** Leverage Salesforce platform capabilities to build agile, scalable, secure custom solutions. This enables customers to differentiate, automate complex workflows, and adapt effectively to market changes without compromising data integrity.

**Opportunities:** Custom financial applications, regulatory reporting tools, partner portals, client self-service platforms, integrating specialized financial algorithms or calculations directly into Salesforce.

Visit us for detailed case studies on platform innovation. For a personalized discussion, **connect with David and Randy**.

### Salesforce AI (Einstein)

**Partnership Focus:** Customers looking to embed intelligent insights and automation directly within Salesforce applications across sales, service, marketing, and specifically within **Financial Services Cloud (FSC)**.

**Customer Value:** Leverage AI to predict customer behavior, recommend relevant actions, automate routine tasks, and personalize interactions effectively. Supports decision-making, boosts efficiency, and contributes to positive client experiences.

**Opportunities:** Predictive lead scoring, intelligent case routing, personalized client communication, fraud detection enhancements, automated data entry, AI-driven insights for financial advisors.

Explore our AI-driven solutions. **Schedule time with David and Randy** to see how AI can transform your operations.

### MuleSoft IDP

**Partnership Focus:** A valuable tool for document-heavy financial services clients, streamlining many critical, manual processes.

**Customer Value:** Can significantly reduce document processing time from days to minutes, noticeably boost data accuracy, and enhance processing capacity, enabling more efficient straight-through processing. This contributes to operational efficiency and the bottom line.

**Opportunities:** Account opening, KYC/AML, loan underwriting, insurance claims, client onboarding, and invoice processing. Provides substantial value for your clients.

Discover our MuleSoft integration expertise. Ready to explore opportunities? **Schedule a meeting with David and Randy**.

# Driving Client Success: The Vantage Point + Salesforce Synergy

Together with Salesforce, we offer distinct advantages addressing client needs more effectively than other options. Learn more about our comprehensive solutions at [vantagepoint.io](vantagepoint.io).
Ready to discuss your specific needs? [Schedule time with David and Randy]().

### Beyond Large System Integrators

**Common Hurdles:** Large SIs bring enterprise-level costs and rigid approaches unsuited for agile growth-segment clients. Teams often lack senior-level engagement leading to slow, bureaucratic processes misaligned with client culture.

**Our Edge:** Partner with Salesforce to deliver effective solutions well-suited for growth-segment engagements leveraging solid expertise across Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), and the entire core platform. Cost-effective, agile, and thorough approach. Consistent senior expertise presence, responsive, culturally aligned, genuine partnership moving at client's pace not enterprise timelines. Visit [vantagepoint.io](vantagepoint.io) for detailed case studies on our client success stories.
Explore partnership opportunities: [Schedule time with David and Randy]().

### Smarter Than Offshore Development

**Common Hurdles:** Offshore teams frequently lack critical financial services domain expertise, leading to communication challenges, time zone issues, and quality concerns requiring extensive oversight. Often focus solely on code production without strategic guidance resulting in hidden costs and rework.

**Our Edge:** Solid financial services domain expertise combined with a strong understanding of the Salesforce platform including Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, and AI solutions. U.S.-based teams perfectly aligned for smooth collaboration ensuring strategic advisory and architecture guidance across all Salesforce capabilities. Navigate regulatory and compliance requirements with ease delivering reliable quality and clear communication truly enhancing Salesforce implementation.
Ready to discuss specific opportunities? [Connect with David and Randy]().

### Excelling Beyond Generalist Partners

**Common Hurdles:** While generalist partners offer broad Salesforce expertise, they often lack deep financial services specialization and a complete platform understanding needed for complex integration and AI-driven scenarios. Limited understanding of financial services ecosystem often learning at client's expense.

**Our Edge:** Strong platform knowledge across the entire Salesforce platform—Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, AI Solutions—complemented by effective MuleSoft integration capabilities and a dedicated financial services focus. Extensive experience integrating specific systems clients use with a solid understanding of industry workflows, regulations, and requirements. Our specialized approach contributes to a proven track record and relevant references delivering integrated solutions.

### Empowering Internal IT Teams

**Common Hurdles:** Internal IT teams often face limited bandwidth for strategic projects, lacking specific integration expertise or exposure to broader industry best practices. Frequently constrained by resources for new platforms and already overwhelmed with maintenance.

**Our Edge:** Work hand-in-hand with internal IT teams augmenting capabilities without replacing them or fostering dependency. Bring specialized expertise across the entire Salesforce platform, including Financial Services Cloud (FSC), and MuleSoft integration knowledge helping them leverage Salesforce more effectively. Systematically transfer knowledge and best practices dramatically accelerating projects while building internal capability and providing crucial surge capacity when needed most.

### Strategic Platforms Over Tactical Solutions

**Common Hurdles:** Tactical point solutions like rigid pre-built connectors often lack customization, struggle to scale, and create new silos and technical debt. Often "band-aids" rather than strategic fixes.

**Our Edge:** Together with Salesforce, we deliver flexible, effective solutions precisely tailored to specific needs leveraging the capabilities of Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), and AI capabilities integrated with MuleSoft expertise. Build scalable architecture growing elegantly with business. Strategic platform approach avoids tactical fixes laying a strong foundation for continuous innovation and expansion ensuring investment appreciates over time for shared clients.

**Partnership Advantage:** Clients benefit from a strong combination of Salesforce's platform leadership, broad ecosystem, and enterprise resources, seamlessly integrated with our strong platform knowledge across Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, AI Solutions, and MuleSoft integration. Our specialized financial services focus and pragmatic, client-centric delivery approach make us an aligned force sized perfectly for growth-segment firms ensuring mutual success and effective platform utilization. For more insights into our specialized approach, visit [vantagepoint.io](vantagepoint.io).
Ready to explore how we can work together? [Schedule a meeting with David and Randy]() today.

# Partnering for Joint Opportunities

Teaming up to maximize collective impact and win more deals together. Ready to explore these joint opportunities further? [Schedule time with David and Randy] to explore partnership opportunities.

01

### Account Review

Dive into existing client portfolios and active pipelines. Identify overlapping accounts where strong Salesforce platform knowledge from Sales Cloud to Service Cloud, Financial Services Cloud (FSC), and beyond can be most effective, flagging high-priority opportunities for immediate joint engagement. Share insights into account context, history, and current initiatives to uncover new growth avenues.

02

### Opportunity Mapping

Collaboratively match strong Salesforce platform knowledge—encompassing Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), MuleSoft integration, and cutting-edge Agentforce and AI solutions—to client's specific needs and challenges. Pinpoint full solution opportunities within current Salesforce deals and relationships, prioritizing accounts where combined efforts create meaningful near-term value. Develop shared, strong value propositions positioning for solid success.

03

### Co-create Outreach

Design coordinated engagement strategies for target accounts. Leverage mutual customer success stories across full Salesforce platform to build credibility and relevance. Define clear, collaborative roles for sales activities ensuring seamless communication and shared ownership of next steps. Develop impactful collateral and presentations that truly resonate.

04

### Build Joint Pipeline

Work hand-in-hand to build a robust pipeline of qualified joint opportunities for full Salesforce solutions. Establish regular rhythm for pipeline reviews and strategy sessions coordinating closely on proposal development and client presentations. Align on deal strategy, pricing, and negotiation tracking progress and adapting approach for continuous wins.

Want to put this process into action? [Connect with David and Randy to get started.]

## Supporting Your Account Teams

**Shared Domain Expertise:** Solid understanding of financial services business models, economics, and challenges. Credibly discuss specific use cases and value propositions across entire Salesforce platform offering solid technical insight into Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), MuleSoft integration, Agentforce, and AI approaches.

**Relevant Client Stories:** Highly relevant success stories from clients in similar situations showcasing full Salesforce transformations. Facilitate reference calls with organizations within their specific vertical and share detailed case studies demonstrating tangible ROI and measurable outcomes from full Salesforce implementations. [Visit vantagepoint.io for detailed case studies.]

**Collaborative Solution Design:** Contribute meaningfully to solution architecture and scoping alongside your team covering breadth of Salesforce platform. Offer realistic estimates and proven implementation approaches based on extensive experience proactively identifying risks and mitigation strategies early in sales process helping craft strong and trusted proposals for full solutions.

**Confidence in Execution:** Stand fully behind joint, full Salesforce solutions. Having successfully delivered similar projects many times, bring a clear implementation methodology and realistic timeline clarity across entire platform. Our track record helps reduce client risk perception boosting confidence in shared delivery of full solutions.

**Shared Goal:** Build a robust, continuously growing pipeline of joint opportunities where combined strengths rooted in strong Salesforce platform knowledge and MuleSoft integration expertise make us a strong, compelling choice for financial services clients. [Learn more about our solutions at vantagepoint.io.]

Ready to discuss specific opportunities and build our pipeline together? [Schedule a strategic discussion with David and Randy.]

# Joint Success Stories

Building a solid library of customer success stories showcasing strong knowledge across the entire Salesforce platform, including Sales, Service, Marketing Clouds, Financial Services Cloud (FSC), Agentforce, and AI solutions, combined with MuleSoft integration capabilities, designed to empower joint efforts and enhance impact.

## Compelling Written Case Studies

Detailed narratives of client partnerships across various financial services sectors leveraging the full Salesforce platform:

**Banking:** Core Salesforce solutions (Sales Cloud, Service Cloud, Financial Services Cloud (FSC)) and key integrations for successful digital transformations for community banks and credit unions.

**Insurance:** Solutions including Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, and reliable integrations driving positive outcomes for agencies and carriers.

**Wealth Management:** Integrated platform implementations and AI-driven insights boosting advisor productivity and portfolio integration achievements for RIAs and broker-dealers.

**Commercial Lending:** Loan automation built on Salesforce enhanced by AI and seamless data integration for small business lending platform achievements.

Each story outlines client challenges, well-rounded Salesforce platform solutions including MuleSoft integration, and measurable outcomes achieved together, providing clear evidence of shared value. Explore our full library of detailed case studies at vantagepoint.io, or schedule time with David and Randy to discuss specific case studies.

## Trusted Client References

A curated list of clients who are satisfied advocates for joint solutions, highlighting Salesforce platform knowledge and eager to share positive experiences.

References organized to easily find a suitable match by vertical, specific Salesforce Cloud (Sales Cloud, Service Cloud, Financial Services Cloud (FSC)), integration type, Agentforce implementation, and client profile.

All necessary contact details and preferred approach for each reference, ensuring smooth outreach.

Background briefings for each reference, giving context needed for productive conversations about integrated Salesforce and integration capabilities.

Guidance on selecting the most appropriate reference for specific prospect situations, ensuring meaningful impact. For more information on our client reference program, visit vantagepoint.io, or schedule a meeting with David and Randy to discuss potential references.

## Concise Use Case Briefs

One-page summaries highlighting specific Salesforce implementations, integration scenarios, and impactful outcomes delivered together.

A clear overview of the technical approach and architecture, including core Salesforce clouds, Financial Services Cloud (FSC), Agentforce, and MuleSoft integration, simplifying complex solutions.

Illustrations of business outcomes and tangible value co-created by combining strong Salesforce platform knowledge with effective integration.

Perfect for initial prospect conversations and qualifying opportunities quickly, making your job easier.

Designed for seamless integration into your presentations and proposals, enhancing your messaging. For a deeper dive into our impactful use cases, visit vantagepoint.io, or schedule a call with David and Randy to explore how these apply to your opportunities.

## Interactive Demo Capabilities

Dynamic demo environments bringing key Salesforce platform scenarios and integration use cases to life.

Collaboratively walk through solution architectures, interactively showing how everything connects across Salesforce Sales, Service, Marketing Clouds, Financial Services Cloud (FSC), Agentforce, and MuleSoft.

Visually demonstrate powerful "before and after" experiences, showcasing the impact of end-to-end Salesforce and AI-driven solutions, making the impact clear.

Support detailed technical discussions with prospects, adding depth to conversations about the full Salesforce ecosystem.

Demos customizable to specific vertical or use case focuses, ensuring relevance for every client. Learn more about our dynamic demo capabilities at vantagepoint.io, and schedule a live demo with David and Randy.

**Our Commitment:** Initial solid materials within the next few weeks, continuously enriching our reference portfolio as we complete more successful joint projects across the Salesforce platform. All materials come with clear usage guidelines and client approvals. Client-approved stories can be confidently used in all your sales activities. We coordinate on any custom requests or unique situations, always prioritizing client comfort and maintaining mutual trust. Ready to discuss specific opportunities or explore our partnership further? Schedule time with David and Randy, or visit vantagepoint.io for further insights into our partnership approach and materials.

# Solid Salesforce & AI Solutions Collaboration

Collaborative approach ensuring partnership thrives delivering effective end-to-end Salesforce platform solutions and measurable results for financial services clients. Learn more about our strong Salesforce & AI solutions at [vantagepoint.io](vantagepoint.io).

1

### Strategic Leadership Alignment

Connect key leaders from both teams to champion shared vision for the Salesforce platform and AI solutions. Regularly review progress, integrated opportunities across Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), and other core platform capabilities, and overall strategic direction. Ensure alignment regarding goals and how we'll deliver meaningful end-to-end value. Clear pathways to swiftly resolve challenges in complex platform implementations. Leaders support important client conversations especially involving Agentforce and advanced AI applications.

2

### Unified Day-to-Day Collaboration

Dedicated partnership contacts from each side to keep joint Salesforce platform engagements moving smoothly. Regular check-ins (monthly or bi-weekly) to sync up on all aspects of collaboration from MuleSoft integration to Sales Cloud, Financial Services Cloud (FSC) deployments and AI solution rollouts. Proactively explore and coordinate joint opportunities across the Salesforce ecosystem. Continuously learn and adapt ways of working together to leverage collective Salesforce expertise effectively. Address and overcome hurdles as unified team focused on platform effectiveness.

3

### Integrated Account Team Synergy

Simple, clear guidelines for teaming up on new Salesforce platform opportunities including Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, and AI solutions. Easy and quick communication channels for real-time coordination on client needs and solution architecture. Shared visibility into joint pipeline across all Salesforce products to track progress together. Work side-by-side on effective Salesforce account strategies and planning. Craft strong strategies for key opportunities by leveraging combined strong platform knowledge and MuleSoft integration expertise as a united front.

Ready to discuss how we can align our strategies for mutual success? **Schedule time with David and Randy** to explore partnership opportunities.

## Staying Connected

**Monthly Partnership Huddle:**

- Review shared Salesforce opportunity pipeline and discuss new platform solution leads, including Financial Services Cloud (FSC)
- Brainstorm integrated account strategies for important financial services targets
- Coordinate joint marketing efforts and events focused on Salesforce innovation, Agentforce, and AI
- Solve problems and improve collaborative process for end-to-end platform delivery
- Celebrate successes across the Salesforce ecosystem and learn from every experience

**Quarterly Partnership Deep Dive:**

- Review collective progress against shared goals for Salesforce platform growth
- Document and share mutual success stories and insights across Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), and MuleSoft
- Set strategic focus for upcoming quarters including new Salesforce product releases and AI advancements
- Ensure leaders aligned on path forward in evolving Salesforce landscape
- Explore new ways to grow and expand partnership by leveraging broad Salesforce capabilities

Want to deepen our connection and set the strategic focus for upcoming quarters? **Connect with David and Randy** for a quarterly deep dive.

## Shared Workspace

**Collaborative Hub:**

- Dedicated communication space for quick chats on Salesforce project updates, including those for Financial Services Cloud (FSC)
- Central, accessible place for all shared Salesforce solution architecture diagrams and project documents
- Integrated opportunity tracking for seamless workflow across the Salesforce sales cycle
- Go-to spot for informal, day-to-day coordination on joint Salesforce initiatives
- Good transparency on joint activities and progress across all Salesforce cloud offerings

**Tracking Our Journey:**

- Shared pipeline tracker to see all Salesforce opportunities and ownership
- Log for joint account assignments and coordination of platform implementations
- Growing collection of shared Salesforce success stories from Sales Cloud, Financial Services Cloud (FSC) to MuleSoft and AI. Visit [vantagepoint.io/casestudies](vantagepoint.io/casestudies) for detailed case studies.
- Dashboard to visualize partnership's impact and Salesforce revenue growth
- Regular updates for executive champions on key Salesforce platform achievements

Interested in reviewing our shared journey and visualizing our impact together? **Schedule time with David and Randy**.

**Our Commitment:** Deeply committed to fostering a productive, and truly reciprocal partnership focused on delivering strong end-to-end Salesforce platform solutions. We dedicate necessary resources, maintain open and consistent communication, and relentlessly pursue shared goals of client success across Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), MuleSoft, Agentforce, and AI in financial services sector.

Ready to take the next step in our collaboration? **Schedule time with David and Randy today**.

VANTAGE POINT

# Building Success Together in Financial Services

Thank you for the opportunity to connect and collaborate. We're genuinely excited about mutual success with Salesforce bringing strong expertise across the platform from Sales Cloud, Service Cloud, Marketing Cloud, and Financial Services Cloud (FSC) to Agentforce, AI solutions, and key MuleSoft integration for complete solutions.

01

### Showcase Joint Customer Wins

We'll lead this working closely with you to highlight strong success stories and references. Create effective client stories, a solid reference list, and relevant use cases demonstrating strong platform capabilities across Salesforce Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, AI solutions, and MuleSoft integration. Empower joint sales efforts, proposals, and client discussions. Visit vantagepoint.io for detailed case studies and success stories. Initial materials within two weeks building continuously together.

02

### Identify Shared Opportunities

Joint effort from both teams. Connect this week for initial exchange then prioritize together within two weeks to develop a shared, prioritized list of joint opportunities leveraging the robust Salesforce platform, including Financial Services Cloud (FSC), and MuleSoft expertise with clear engagement strategies. Follow up with ongoing collaborative pipeline reviews and strategy sessions.

Ready to discuss specific opportunities and strategies? Schedule time with David and Randy today.

03

### Collaborative Approach

Both teams work together supported by executive engagement to align on collaborative rhythm within two weeks and schedule first joint session. Establish clear understanding of communication flow, meeting cadences, and shared success milestones ensuring we deliver complete, integrated solutions. Commitment to continuously refine how we work together for optimal results.

To align on our collaborative rhythm and schedule our first joint session, connect with David and Randy.

04

### First Joint Success

A collaborative effort. Goal is to identify and win the first joint opportunity together showcasing combined strength and Salesforce platform knowledge, including Financial Services Cloud (FSC), through a positive client outcome. Use this experience to continuously refine the collaborative approach and learn what works best.

## Connecting with Our Team

**Your Partnership Ally:**

David Cockrum | david@vantagepoint.io

- Primary point of contact for strategic discussions and coordination
- Collaborating on account strategies and opportunity identification
- Ensuring smooth partnership operations and communication
- Day-to-day collaboration and alignment

**Technical Solution Expert:**

Randy Wandell | randy.wandell@vantagepoint.io

- Solution design and architecture support across Salesforce platform (Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, AI)
- Technical questions and integration discussions with MuleSoft expertise
- Client presentations and discovery call support
- Proposal development and scoping for complete solutions

Ready to connect? Schedule a meeting with David and Randy.

**Executive Advocates:**

David Cockrum and Randy Wandell

- Guide strategic partnership direction and vision
- Available as escalation point for significant opportunities or discussions
- Engage with executive clients when appropriate
- Participate in quarterly business reviews and strategic planning

**General Inquiries:**

- **Email:** partnerships@vantagepoint.io
- **Phone:** +1 (469) 652-7923
- **Website:** vantagepoint.io

## Our Shared Commitment

We promise to be consistently responsive, genuinely collaborative, and focused on helping you deliver meaningful value to your financial services accounts. Our strong platform knowledge across the full Salesforce platform including Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, AI solutions, and MuleSoft integration ensures effective and innovative solutions.

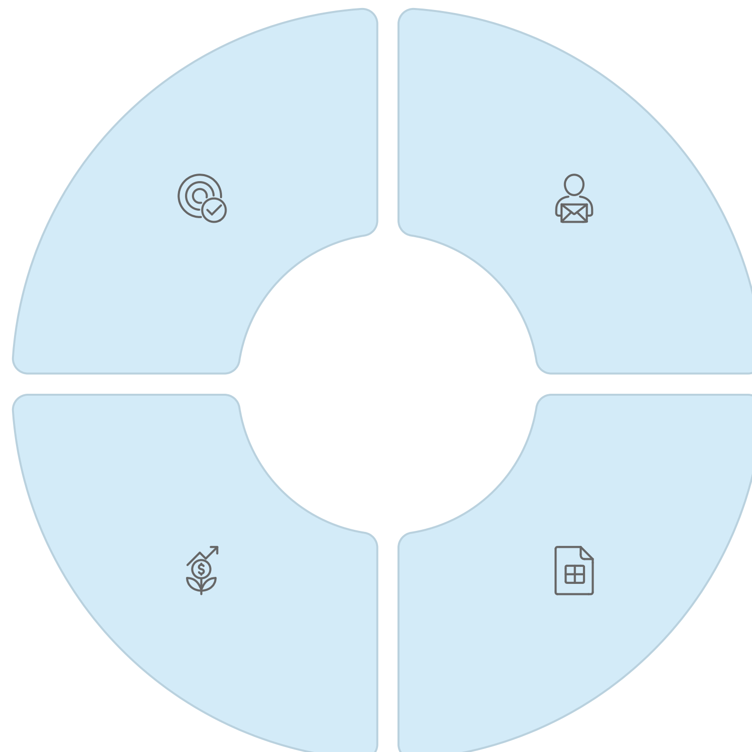
Your success is our success. Learn more about our robust solutions at vantagepoint.io.

Ready to start building something great? Schedule a meeting with David and Randy today.

# Let's build something great together.

# Partnership Success Framework

We're committed to making this partnership flourish through strong collaboration, clear communication, and shared passion for achieving success together.



### Shared Vision

Build strong pipeline of joint opportunities where combined strengths offer meaningful value. Win together in financial services accounts by collaborating on pursuit strategies and coordinating engagement every step of the way. **Schedule time with David and Randy** to explore these opportunities.

### Open Dialogue

Transparent and efficient communication ensuring real-time coordination. Regular check-ins keep us aligned on strategy, opportunities, and execution. Proactively share insights, tackle challenges, and celebrate successes as a team.

### Mutual Growth

Every engagement is a chance to learn and refine how we work together. Evolve partnership processes based on real-world experience, continuously expand joint capabilities, and grow market presence through sustained commitment and investment.

### Client-First Focus

Deliver meaningful outcomes reflecting positively on both organizations. Collaborative and professional approach protecting and enhancing both Vantage Point and Salesforce brands while relentlessly focusing on achieving client success and satisfaction.

---

We're genuinely excited about teaming up and the meaningful value we can create for financial services clients. Our strong Salesforce platform knowledge including expertise in Sales Cloud, Service Cloud, Marketing Cloud, Financial Services Cloud (FSC), Agentforce, and advanced AI solutions combined with our MuleSoft integration expertise and exclusive financial services focus are the perfect complement to Salesforce's platform leadership and market presence. **Learn more about our strong solutions at vantagepoint.io.**

Together we can empower growth-segment financial institutions to compete effectively, grow strategically, and deliver strong customer experiences—all while working within realistic budget and resource constraints.

Thank you for being such valuable partners. Let's achieve remarkable things together. Ready to discuss specific opportunities and next steps? **Connect with David and Randy** to schedule a meeting. **Visit vantagepoint.io for detailed case studies and partnership insights.**