Project: Enabled touchless provisioning and onboarding of clients for an industry leading cloud-based software as a service (SaaS) company providing an all-in-one platform for HR, Benefits and Payroll, geared specifically for small and mid-sized businesses.

Developed a unified provisioning application on Salesforce, bringing in all the business processes and data into one system. This system streamlined assignment, management, tracking and reporting of all provisioning activities for client onboarding. A real-time view of all projects tracks the team’s efficiency in completing the tasks.

Salesforce Process builder flows and workflows and the auto-assignment of tasks were exclusively used to design the application and streamline the business processes.

Project: File Manager -App exchange product helps business users tag files, search with tags for a file and securely share files to external users. It leverages the native Salesforce file system and enhances its use in compliance and regulated industry to manage files effectively Currently, App is at the final review process for release.

Project: Implemented Financial Services Cloud for financial advisor firms which makes easy for advisors to deliver a concierge level of service with the personalized, proactive advice clients expect. With an enhanced set of productivity and engagement features, advisors can spend less time gathering client information and more time doing what they do best - providing holistic, goal-based advice that puts their clients at the center of everything they do.