



MONDAYCALL

QUICKFACTS

- Certified, experienced Salesforce.com consultants
- Best practice Salesforce.com implementations from start to finish
- 500 customers across over 20 industries worldwide
- Full range of Salesforce.com services for new and experienced customers



BENEFITS OF CONSULTING

- Done right the first time
- Rapid time to value
- Utilize best practices experience
- Deliver scalable solutions to meet future needs
- Get more from your technology investment

FINANCIAL INDUSTRY SERVICES

MondayCall has deep experience in the financial services industry.

MondayCall has more than 100 customers in financial services ranging across sectors as Private Equity, Venture Capital, Hedge Funds, Investment Banks, Broker Dealer, Wealth Management,

Portfolio Management, Credit Unions, Insurance, Commercial Real Estate, Retail Banks and more. In addition, MondayCall has conducted successful projects for a number of customers who specialize in finance related businesses for specific industries such as real estate, energy, food and beverage, transportation and others. Our financial expertise also spans financial services startups and suppliers of financial services companies including market information providers, payment systems and more.



Financial Services Sector Experience

PRIVATE EQUITY

Tracking of funds is incredibly important. From deal sourcing to due diligence to closing of funds, Salesforce can help the deal team manage the investment process – all in one central location. MondayCall has helped leading companies in the Private Equity space centralize their activities into a single, unified platform. By modeling their business in Salesforce, Private Equity organizations can scalably manage their business while still offering the all-important personal touch.

MondayCall has built the infrastructure necessary to support fundraising. When supported by the proper systems, the recruitment of Limited Partners (LP's) can be significantly more effective and scalable. Building the right process, creating the reports for visibility, and tracking the participants in the process including investors, advisors and consultants, enable the Fundraising team to raise the quality of their recruitment process.

VENTURE CAPITAL

Venture Capital is a people business and it is critically important for Venture Capital firms to nurture and track talent. We have set up systems to support best-in-class talent management so that key executives, industry leaders, engineers, sales people, etc. can be scalably managed.

MondayCall has helped numerous Venture Capital firms with scaling the fundraising process by creating more organization in the investor acquisition, management and ongoing communications process. Deal tracking from sourcing

WHY MONDAYCALL

- Experience:**
 Deployed over 1,700 Salesforce and Salesforce projects across 500+ customers
- Expertise:**
 Certified and experienced MondayCall consultants and developers including a team of Salesforce MVP's and leaders of Salesforce user groups
- Methodology:**
 Quickstart and Optimization projects utilize proven best practices to ensure success, on-time and on-budget
- Coverage:**
 MondayCall provides a full range of consulting and development services across the Salesforce platform and ecosystem ensuring that you have a total best of breed solution

to leads to due diligence and ongoing management can be modeled in Salesforce so that everyone can get to the information they need quickly and easily. Even the due diligence process can be automated to encourage best practices and provide transparency on deal status and flow.

INVESTMENT BANKS AND HEDGE FUNDS

MondayCall has helped a number of investment banks and hedge funds better manage their businesses. We have set up application infrastructure to support investor management activities including bank and private institutional recruitment and ongoing investor communications.

On the deal management side, whether it's IPO's, secondaries, acquisitions or advisory, deal management can be centralized and scaled to provide better efficiency and more visibility into deal activities. Integrations with Asset Management Systems enables a single view of the customer.

BROKER-DEALERS

A variety of industries, including investment banks, insurance firms and others have sophisticated and widely dispersed broker/dealer networks. Salesforce is ideal for being able to scale the process for broker/dealer recruiting and management. MondayCall has set up a number of portals so that broker/dealers can access critical information at any time. MondayCall has also set up Salesforce to provide mass customized email infrastructure for effective, scalable and centralized broker/dealer communication.

In addition, we have set up the ability to manage market development funds (MDF) distribution to generate more business. Broker/dealer opportunities can be coordinated as well in order to perform effective team selling and to scale commissioning – all through a one-stop portal.

WEALTH / MONEY / PORTFOLIO MANAGEMENT

MondayCall has worked with a number of firms in this industry to set up an infrastructure for pipeline management. Whether the distribution model is direct or through channels, Salesforce can help gain visibility in every step of the process.

Investor communications can be handled through centralized mail and through self-help portals. MondayCall has helped companies set up their upselling infrastructure so existing relationships can be scaled and strengthened. Integrations with various back end systems enables a full view of the customer in a single location.

Salesforce Financial Services Cloud is focused on wealth management systems based on powerful Salesforce CRM that allows advisors to connect with clients in a whole new way. Financial Services Cloud ushers in a new era of wealth management software, with advisors collaborating with clients from any device. Advisors can build 1-to-1 relationships with clients for key investment decisions based on goals and life events. So investors can manage their wealth more intelligently, and meet their financial goals.



MONDAYCALL

HOW WE'RE DIFFERENT

- **Solution, not Technology:**
A solution doesn't end when the last line of code is written or the last workflow process is created.
- **Relationships, not Projects:**
We value relationships. We are your trusted partner that will help you at any step of the lifecycle,
- **Execution is Key:**
We build frequent milestones in each project so you're always aware of the progress towards your next goal.
- **Good Planning:**
Each organization is different, so we never take a cookie-cutter approach. Successful projects begin with an active approach that leverage industry and business process knowledge.

CREDIT UNIONS / COMMERCIAL BANKS

MondayCall has set up the infrastructure for several large-scale credit unions. By automating the new member recruitment process and member management process, the relationship between Credit Union and its members is solidified, resulting in more opportunities for upsell.

With a deeper understanding of its members, more opportunities can be gained through cross-selling products. Campaigns can be conducted through Salesforce to educate its members and to provide the products and services the members need managed.

INSURANCE

MondayCall has worked with both local insurance and international scale insurance firms providing services across the board. MondayCall has set up the infrastructure to track individual customers and businesses, providing a 360 degree view of the customer.

For several firms, we have also set up the infrastructure to manage the entire broker/dealer network. Using Salesforce's portal products, broker/dealer interactions can be tracked in one place enabling Insurance companies the visibility they need to help their broker/dealer's be more effective.

COMPLIANCE

Financial firms are subject to stringent financial requirements. MondayCall has helped customers with key infrastructure improvements to address Personal Identifiable Information (PII) data security and privacy, data backup and recovery and audit compliance. To meet corporate governance requirements necessitates a full view of the infrastructure and the proper architecture and setup to effectively ensure compliance.



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Get Started Today!

Learn more about how MondayCall can help you make more the most your Salesforce.com investment. Please contact your MondayCall Account Manager or contact us directly at sales@mondaycall.com for more information.