

## COMPANY OVERVIEW

Xceede Solutions is a Digital Service Design consulting firm providing customer journey centric technology solutions across Marketing, Sales, Service, and Analytics.

As a boutique provider, we are a high-touch, local, trusted advisor and business partner that combines business strategy, industry best practices, and technology to empower growth for our clients.

Our SaaS software, PLNR – Sales-Driven Planning, and Sales-Driven Planning methodology enable our clients to plan, budget, forecast, and execute on their growth strategies.

As a Salesforce® ISV and Consulting Partner, we leverage the Salesforce® platform and complimentary technology solutions in innovative ways to operationalize strategy and streamline execution.

### General Information

Name	Xceede Solutions Inc.
Year Incorporated	2015
State of Incorporation	District of Columbia
Corporation Type	Corporation (S-Corp)
D-U-N-S #	079981147
Address	15305 Dallas Parkway 12th Floor Addison, TX 75001
Website	www.xceedesolutions.com

### NAICS Codes

511210	Software Publishers
541511	Custom Computer Programming Services
541512	Computer Systems Design Services
541519	Other Computer Related Services
541611	Administrative Management and General Management Consulting Services
541618	Other Management Consulting Services

### Certifications

Minority Business Enterprise  
*(by National Minority Supplier Development Council)*



### SaaS Application

PLNR—Sales-Driven Planning  
*(available on Salesforce® AppExchange®)*



## CORE CAPABILITIES

### Management Consulting

CUSTOMER RELATIONSHIP MANAGEMENT  
SALES METHODOLOGY  
PIPELINE MANAGEMENT  
LEAD GENERATION  
CUSTOMER EXPERIENCES  
MARKETING AUTOMATION  
SERVICE MANAGEMENT  
REVENUE MANAGEMENT  
PLANNING, BUDGETING AND FORECASTING  
CONTRACT LIFECYCLE MANAGEMENT

### Business Consulting

DIGITAL TRANSFORMATION  
BUSINESS PROCESS MAPPING  
BUSINESS PROCESS RE-ENGINEERING  
BUSINESS REQUIREMENTS  
USER ACCEPTANCE TESTING  
USER ADOPTION AND TRAINING  
CHANGE MANAGEMENT  
PROJECT MANAGEMENT  
PROGRAM MANAGEMENT  
PROGRAM GOVERNANCE  
CENTERS OF EXCELLENCE

### Technology Consulting

SOFTWARE DEVELOPMENT LIFECYCLE  
SOFTWARE DEVELOPMENT OPERATIONS (DEVOPS)  
AUTOMATED APPLICATION TESTING  
CUSTOM SOFTWARE DEVELOPMENT  
DATA MODEL DESIGN  
DATABASE DESIGN  
APPLICATION SECURITY  
APPLICATION ARCHITECTURE  
APPLICATION INTEGRATION  
BUSINESS INTELLIGENCE  
DATA VISUALIZATIONS  
ARTIFICIAL INTELLIGENCE  
ENTERPRISE DATA MANAGEMENT

## CORE SERVICES

### Management Consulting

- Design and implement strategic frameworks, methodologies, and industry best practices around Sales, Marketing, and Service Management

### Salesforce® Ecosystem

#### Sales Cloud

- Implement sales motions from Prospecting to Pipeline and Account Management
- Implement Territory Management and related planning activities
- Implement Quote to Order processes along with Contract Lifecycle Management using Conga® Contracts for Salesforce
- Enhance performance and productivity of Sales teams through solutions with third-party native apps, such as Conga® suite

#### Tableau CRM

- Implement Data Visualization and Analytics using Tableau® Online and Tableau® Data Prep

### Service Cloud

- Implement Case Management solutions on Service Cloud®
- Leverage Omnichannel to manage customer inquiries centrally while elevating service levels
- Integrate with telephony and other messaging platforms for inbound and outbound communications, including Einstein chat bots

### Marketing Cloud & Pardot

- Implement Email, Social, and Advertising Studios as part of Digital Marketing and Advertising
- Increase Account Engagement and implement an Account-Based Marketing program
- Implement Marketing Analytics

### Salesforce Platform

- Configure, customize, develop, and integrate of Salesforce®
- Develop custom applications to solve unique business challenges

### Sales-Driven Planning

#### PLNR—Sales-Driven Planning App

- Implement Sales-Driven Planning methodology around Territory, Account, and Opportunity budgeting and forecasting
- Enable what-if and scenario analysis across different planning versions
- Identify “Gaps to Target” and implement mitigation plans

### Enterprise Data Management

#### Integration Platforms (Jitterbit, TIBCO)

- Implement integration solutions across Salesforce® and critical enterprise system
- Develop an enterprise framework for Application Programmable Interfaces (APIs)

### Data Backup and Recovery

- Implement Data Backup and Recovery solution for Salesforce® using OwnBackup

## CLIENT SUCCESS



Implemented Salesforce® Sales and Service Cloud for 425 users across US, Canada, Australia and New Zealand spanning Sales, Marketing, and Education from Prospecting to Account Management, including integration with SAP. Leveraged Tableau for Analytics and data visualizations.



Implemented Sales Reporting, Account Management, Contract Lifecycle Management, and custom Loyalty Reporting solution across Sales, Legal, and Accounting departments along with data management processes to import data from 10 distributors.



Implemented Lead Management, Pipeline Management, Proposals and Contract Management solutions on Salesforce® Sales Cloud along with integrations with data providers for Prospecting and Account Management.

## TECHNOLOGY PARTNERSHIPS

