

Financial
Services
Technology Firm



everge – GO LIVE SUCCESS STORY

Modernizing & Streamlining Processes for Merchants & Partners

 **Salesforce Products**



Company Information

Company serves over 8,000 clients across – Financial Performance, Retail Delivery, Imaging, Payment Solutions, Information Security & Risk Management, and Online & Mobile.

Why everge?

Over two decades of experience with Financial Services & Technology firms

A combination of Salesforce and complex integration expertise

Business Challenge

- **Firm was using ContractPal** for Service Contracts for their full Risk Management and Service Product suite for partners and merchants.
- **ContractPal licenses were costly**, as they are based on transactions vs. logins. This cost difference was becoming more pronounced as growth was and is accelerating
- **ContractPal was also costly to maintain**, as it was highly customized and required heavy programming for requested enhancements
- **The solution was not scalable**, as it was a first-generation cloud platform and could not keep pace with growth trajectory.

Success Outcomes

- **6-month ROI** based on transition to Salesforce user licensing model vs. ContractPal's transaction fees and lower maintenance and development costs
- **Increased Collaboration through Partner Community** which allows Partners and Merchants to open applications, submit cases and chat with firm's team
- **Extensive Process Flow Automation and Modernized UI** for Risk Applications and Onboarding of new customers and products
- **Total of 22 critical interfaces** including ACH, Experian, and GIACT with advanced automation



The new Salesforce platform allows us to easily onboard partners and has consolidated the entire risk management processes through integration with our legacy systems as well as 3rd parties like Conga, Experian, and Adobe eSign."

– Technical Business Operations,
Manager | EPS Risk Management

Get in Touch



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