

# APPCENTRICA CUSTOMER SUCCESS STORY

## FIRMA Foreign Exchange

**FIRMA** Foreign Exchange

### Industry

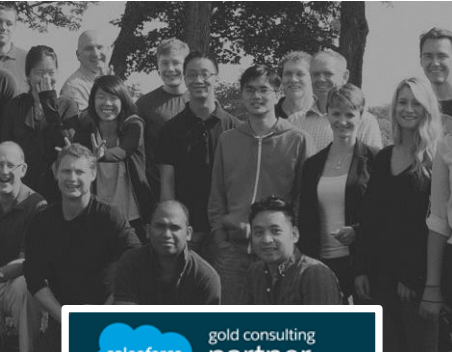
- Financial Services
- Currency Exchange

### Project Outcomes

- Improved sales efficiency
- Centralized data
- Less manual effort
- Improved user adoption

### Solution Features

- Sales Cloud
- *currencylayer* integration
- Outlook integration
- CTI integration
- Training



### About AppCentrica

We've built our Salesforce practice one customer at a time based on quality and strong relationships. We deliver proven solutions for:

- Sales Cloud + CPQ
- Service Cloud + FSL
- Einstein Analytics
- Community Cloud
- MuleSoft
- Pardot
- B2B Commerce
- Heroku & Custom Lightning Development

### About FIRMA Foreign Exchange

Founded in 1998 in Edmonton, FIRMA Foreign Exchange facilitates foreign exchange transactions for businesses of all sizes, processing \$10 billion in annual payments. FIRMA's services include foreign exchange, domestic and international transfers. FIRMA has grown to 11 locations with operations in Canada, the United States, England, Australia, and New Zealand.

### Challenge

FIRMA implemented Sales Cloud in 2016 for its traders. Although the platform was being used to some extent, management believed an overhaul was needed to realize the full potential of Salesforce. Specifically, they sought to redevelop their lead management process and reduce reliance on tools and documentation that lived outside of Salesforce.

The previous process involved a series of steps. First, a client would submit an exchange request via email. The trader would then manually log the request, and monitor *currencylayer* (a real-time currency converter) until the appropriate criteria had been met. Once satisfied, the trader would complete the request and email the client confirmation.

### Solution

AppCentrica worked with FIRMA to gather the necessary requirements to transform Sales Cloud into a centralized sales platform.

First, an Outlook and CTI integration were setup to help automate activity logging and reduce manual efforts. Next, AppCentrica configured an integration with *currencylayer* therein enabling pricing information to flow directly into Sales Cloud.

Second, AppCentrica enhanced FIRMA's existing Sales Cloud configuration and built out a series of automations to further streamline the sales process.

One automation of particular importance is designed to notify a trader via email when the optimal pricing conditions exist to satisfy a trading requirement, this ensures a trade is never missed and is executed in an optimal manner.

Lastly, AppCentrica provided in depth end-user training for the FIRMA team to ensure user adoption would be high.

### Outcomes

The Sales Cloud improvements and subsequent integrations have drastically improved FIRMA's lead management process. Traders now view Sales Cloud as a performance enhancing tool. It is a one-stop shop and adoption rates have improved significantly as a result. The automations built by AppCentrica have streamlined a previously cumbersome process and empowered the team to spend more time progressing new business deals. Ultimately, the Sales Cloud overhaul was very successful and management can now better realize their return on their Salesforce investment.



*"We were recommended to AppCentrica by our Salesforce Account Executive and were very glad to make the connection. We'd been struggling to get full ROI from the system and needed to make some changes to really make Salesforce easy to use - and useful - for our brokers. AppCentrica has been a great partner to work with - very responsive and knowledgeable. I personally was highly impressed with the training they delivered to our team and will be engaging them for more training and optimization work."*



**Michael Malak**  
Regional Sales Director, FIRMA Foreign Exchange