

### Heart

We value people's resilience and creativity, fostering a workplace where technology is used in service to human ingenuity.

### Excellence

We empower people to do their best work, providing them with the tools and support they need to excel.

### Respect

Human-centered design requires listening to a diverse set of inputs and applying unique perspectives to create amazing solutions

### Optimism

We dream big and believe in positive outcomes, approaching challenges with a spirit of possibility.

# CAPABILITIES STATEMENT

## Company Introduction

Compass Strategy Design is a Salesforce Services and Consulting company that specializes in making Salesforce a Force Multiplier. Our company exists because most Salesforce implementations are ineffective. We address this shortfall by applying our human-centered design framework (CARES) to Salesforce workflows, integrations and case management. Our approach addresses the pain points of your employees. The outcome is force multiplication that frees your employees to focus on strategic goals and their most important work.

## Capabilities

### Salesforce Clouds & Technologies

- Public Sector Solutions and Data Models
- Modern API-first Integrations
- Case Management and Workflows
- Salesforce Marketing Cloud and Pardot
- Sales and Marketing Cloud
- Contact Center and Service Cloud Voice

### Application Development

- Salesforce OmniStudio Developers
- Iterative Development through Agile
- Salesforce Certified Administrators
- Salesforce Certified Platform Developers
- Certified UX Designers
- Salesforce Certified Architects

## Past Performance



Saved DTC hundreds of thousands of dollars annually and improved corporate forecasting for revenue and manufacturing by redesigning their Salesforce platform.



Designed a way for the Library to streamline partnerships and contracts with providers by developing a Salesforce case management platform.



Increased executive visibility into Corporate performance in key areas by integrating Kagwerks Salesforce into a Parent company instance.



Migrated an existing Sales organization and their processes to Salesforce from C4C, including a successful, complex data migration.



Multiple key personnel, including our CEO worked at Salesforce and helped define key Public Sector Solutions data models and capabilities.

## Why We're Different



CARES is our in-house Strategy Design System adapted from military strategy, academia, and the world's leading for-profit organizations.

**Collect** - Deep discovery on the organization with an empathetic lens on how your current state affects stakeholders.

**Analyze** - Synthesis and debrief of findings with key stakeholders to develop a focal point for our strategic roadmap.

**Roadmap** - A coordinated plan of activities that ensures every part of the organization is moving towards our agency priority goal.

**Execute** - Improving processes and developing technology that empowers an organization's most precious asset: their **people**.

**Sustain** - We continuously improve and evaluate against our key performance indicators, moving toward a common goal.

## NAICS

**541511** - Custom Computer Programming Services

**541512** - Computer Systems Design Services (Primary NAICS)

**541519** - Other Computer Related Services

**541611** - Admin. Mgt. and General Management Consulting Services

**541613** - Marketing Consulting Services

**541618** - Other Management Consulting Services

## Contract Vehicles

Compass has established strategic partnerships with multiple Contract Holders, and is capable of receiving sole-source awards. We are eager to collaborate with your Contracting Office to identify the most convenient method for obtaining our services.

## Company Profile

**UEI:** KXJRRMJD6P55

**CAGE:** 9QEY7

**Size:** Small

**Socio-economic Status:** VOSB



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