



Introhive for Salesforce

salesforce

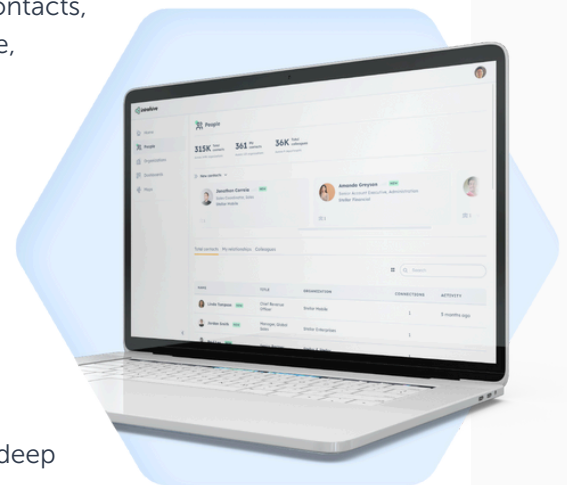
Data Automation and Relationship Intelligence for Salesforce

Relationships are the cornerstone of business. Your ability to identify and drive new business and cross-sell opportunities, monitor client health and retention, and facilitate cross-departmental collaboration all requires complete and accurate contact data.

Introhive's Relationship Intelligence Platform automates the capture and enrichment of contact and activity data in Salesforce and arms firms with valuable and contextual relationship insights – unlocking complete visibility into your firm's relationship network to become "One-Firm".

The Three Pillars of Introhive for Salesforce:

- Data Automation:** Automatically uncover and sync contacts, companies, activities, and relationships into Salesforce, saving time and tapping into the full potential of your known network.
- Data Quality:** Streamline and augment client data quality management, enriching contacts and activities with the latest available data for effortless maintenance, ensuring Salesforce remains the source of truth.
- Relationship Intelligence:** Arm trusted advisors with deep relationship insights, weaving engagement data into every business decision to identify risks and opportunities, ultimately realizing your "One Firm" vision.



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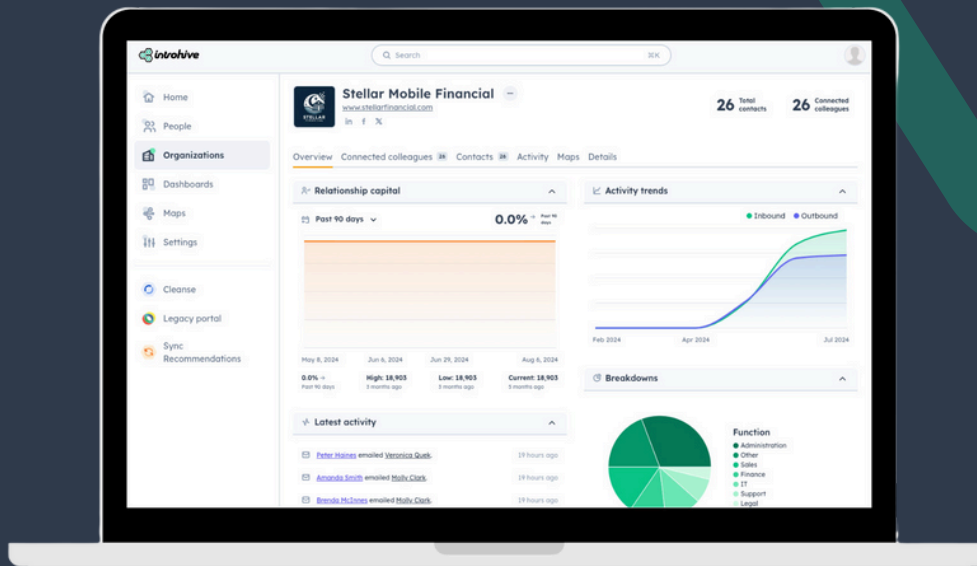
Colliers

Freshfields

CBRE

LAING O'Rourke

CANARY WHARF GROUP



Why Firms are Integrating Introhive and Salesforce:

1

Tailored to your unique needs

Take granular control over the contacts that are automatically added to Salesforce by customizing your sync criteria by seniority, relationship strength and more. Set rules to fully automate updates, or manually review or ignore contacts based on unique criteria.

2

Maintain data accuracy and completeness

Automated contact capture turns Salesforce into the “single source of truth” for contact data, enabling reporting and insights to inform strategy with confidence. Industry-leading data enrichment automatically fills in contact data gaps, establishing a comprehensive and trusted source for contact intelligence, uncovering opportunity for Sales, Business Development, and Marketing efforts.

3

Relationship insights in your workflow

Surface and leverage integrated relationship insights in your flow of work using Lightning Web Components, iFrame or Introhive’s browser extension to spot opportunity and mitigate risk without disrupting your focus.

4

Maximize productivity and performance

By automating data entry and syncing only the most valuable data into Salesforce, you’ll reclaim valuable time for revenue-generating tasks, reduce operational costs and enhance the quality of CRM data – driving increased ROI, adoption and trust.

Connect Introhive and Salesforce Data Cloud to bring your Customer 360 vision to life and fuel AI-driven tools like Einstein Copilot with trusted and accurate relationship data.

Connect with us to learn more about Introhive for Salesforce.