G-Cloud 15

Salesforce Platform Services – Service definition document



January 2026

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Winfo Overview

winfo Solutions

Established in	Customers	Engagements	ORACLE
2015	50+	200+	Cloud SELL & SERV Expertise

AICPA SOC | ISO 20000-1:2018 COMPANY | ISO 9001:2015 COMPANY | ISO 27001:2013 COMPANY

375+ Experts

30 $b+ Clients

6 UK, US, IN IE, RO, UAE

Applications

ORACLE FUSION APPLICATIONS | ORACLE E-BUSINESS SUITE | salesforce

Technology

ORACLE Platform as a Service (PaaS) CLOUD | ORACLE APPLICATION EXPRESS | Java Web Application Development

Cloud Infrastructure

ORACLE Cloud Infrastructure | aws | Azure | Google Cloud

Winfo Services

Strategy | Assessment | Implementation | Custom Development | Managed Services

winfo CloudX | winfo Data | winfo Bots | winfo Test | winfo Agents

Partnership: ORACLE | Microsoft | Google Cloud | aws | salesforce | UiPath | databricks

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Our Services Portfolio

IMPLEMENTATION

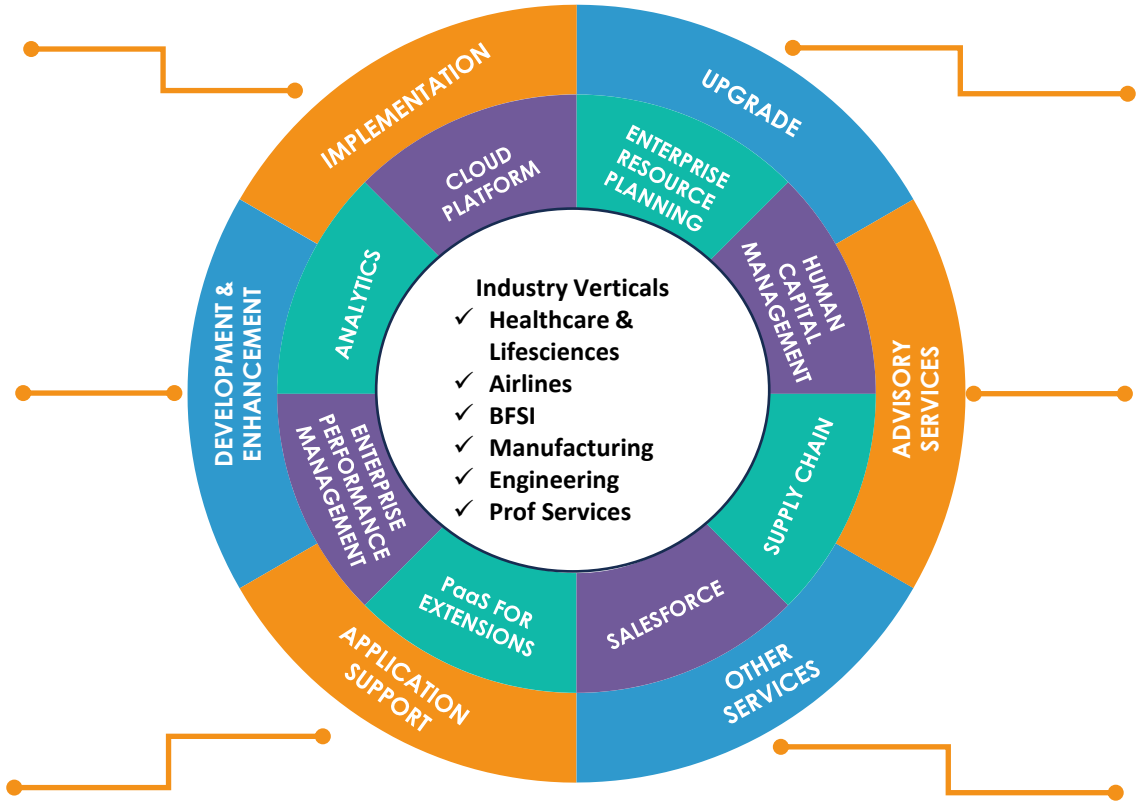
- Full life-cycle implementation
- Innovations through Redwood and AI Agents
- Global rollouts
- Additional Modules Enablement
- Analytics / BI

DEVELOPMENT & ENHANCEMENT

- Extensions using tools
- Integrations & Reports development
- Custom AI Agent development
- APEX based solutions
- Custom Apps development

APPLICATION SUPPORT

- Managed Services
- Functional & Technical Support
- Preventive maintenance
- Database & application administration support



UPGRADE

- Workloads Migration to Cloud Platforms
- Application upgrades
- Database upgrades
- OS & database migration
- SSO and DR Set-up

ADVISORY SERVICES

- Cloud Advisory
- Redwood assessment
- Health Checks/ Audits
- Business Consulting

OTHER SERVICES

- Reimplementation / Cloud assessment
- Consolidation – Application & Instance
- Testing-as-a-Service
- Process Automation

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Salesforce Offering & Capabilities



Consulting



Implementation



Optimization



Support

salesforce sales cloud

salesforce service cloud

salesforce platform

salesforce experience cloud

salesforce einstein analytics

Agentforce



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Powered by our Salesforce experience



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Salesforce Solution Offerings



Sales Cloud with AI and Automation

- Lead and Oppty Mgt
- Sales Forecasting
- Workflow Automation
- Einstein AI



Service Cloud with AI enabled Service

- Case Management
- AI-Powered Chatbots and Knowledge Base
- Omni-Channel Routing (Phone, Chat, Social)
- Agentforce



Marketing Cloud with Personalization

- Journey Builder and Campaign Automation
- Email Studio and AI for Content Recommendations
- Omni-Channel Routing (Phone, Chat, Social)
- Social Studio for Social Listening



Analytics & Integration with Advanced Tools

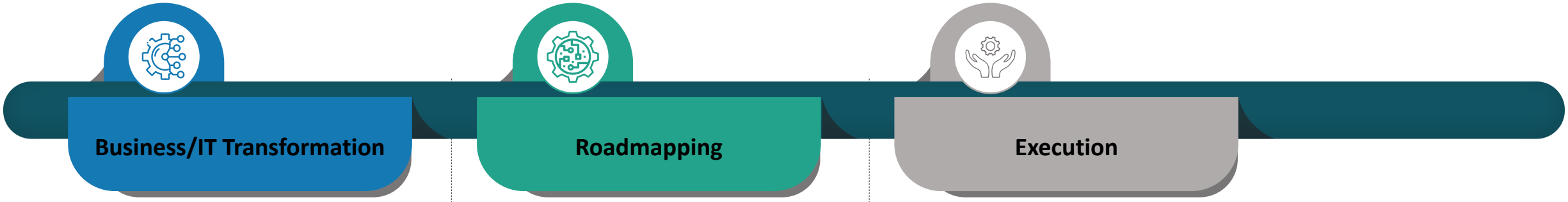
- Tableau CRM and Real-Time Dashboards
- Einstein Analytics for Predictive Insights
- AppExchange and API Integrations

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Salesforce Delivery Framework

- Our Salesforce delivery model focuses on **agility, quality, and long-term value realization**. From initial discovery through design, build, and post-go-live support, Winfo ensures alignment with client goals and measurable business outcomes.
- As a trusted **Salesforce Consulting Partner**, Winfo Solutions continues to deliver transformation across the Salesforce ecosystem, empowering clients to drive innovation, improve customer engagement, and accelerate digital growth.



Strategy & Design

Business Strategy, Prototyping, Experience Design, Technology Vision

Platform Advisory

Transformation Roadmap, Center of Excellence Design, Application Modernization, Product Evaluation, Org Health check, Org Rationalization, DevOps

Build

Sales, Service, Experience Cloud Implementation, CPQ/CLM AppExchange Solutions, Custom Platform Solutions, Global Roll outs and Change Management

Test

Application Testing, Automation Testing, Performance Testing

Run

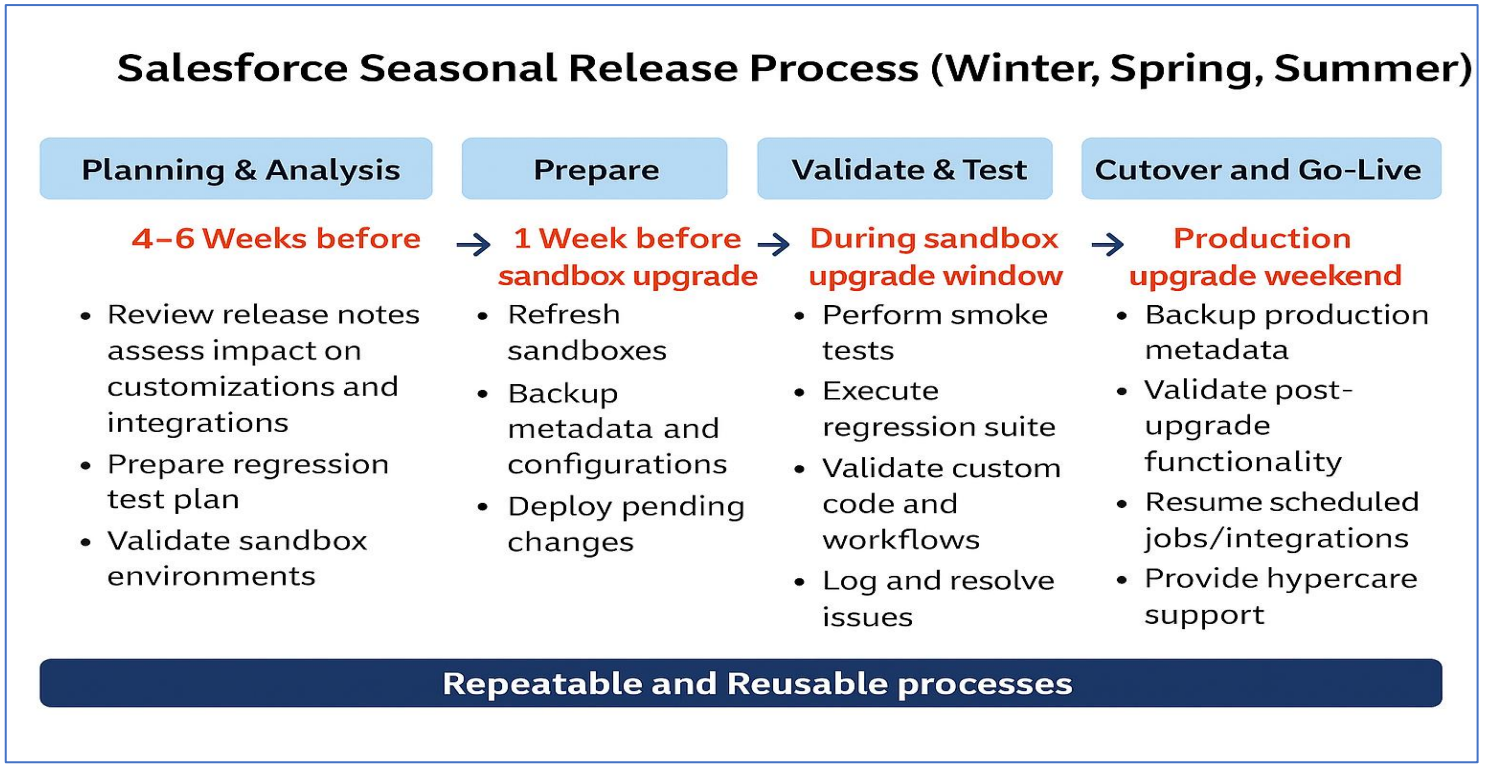
Application Support, Release Management, Change Management, UI Upgrades- Classis to Lightning

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Salesforce Seasonal Release Process

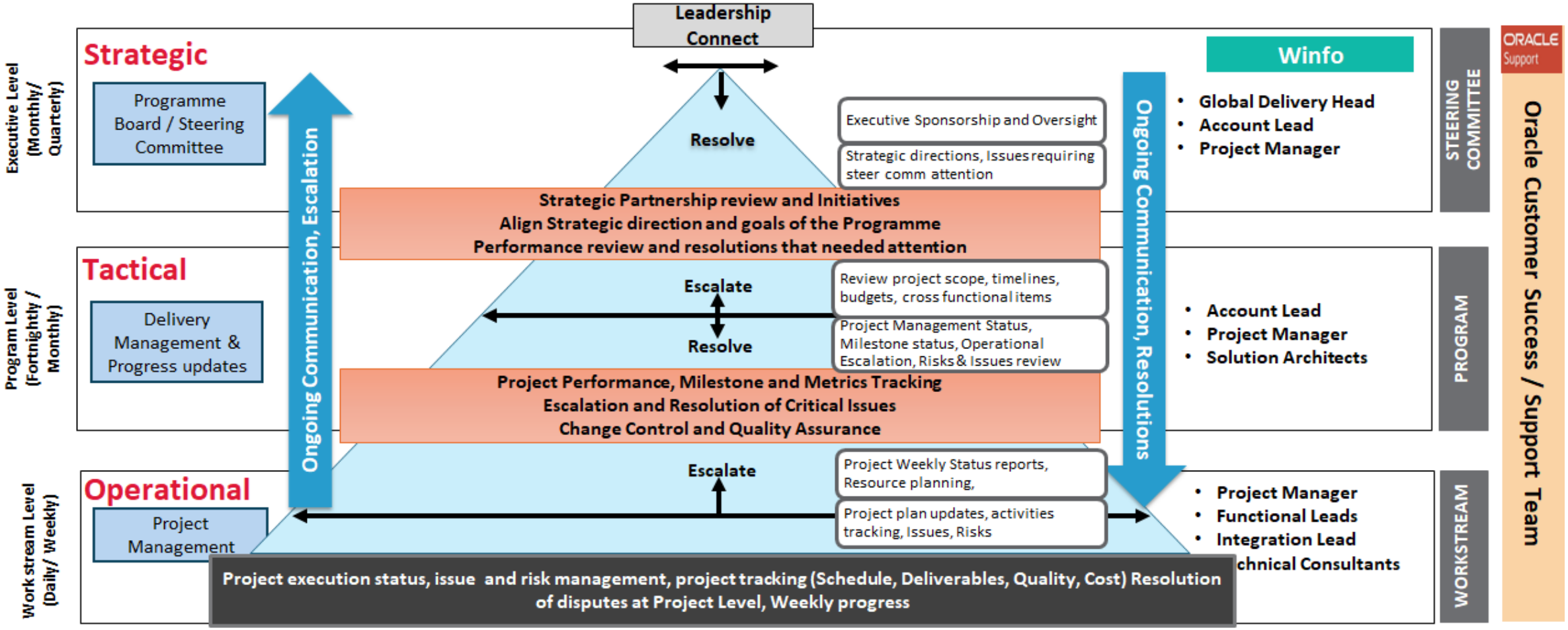
- As part of its tri-annual release cycle, Salesforce delivers Winter, Spring, and Summer updates to provide customers with the latest innovations, security enhancements, and compliance features.
- These releases introduce new capabilities across the Salesforce platform, including Sales Cloud, Service Cloud, Experience Cloud, and industry-specific solutions. Each release is designed to ensure continuous improvement in functionality, user experience, and integration capabilities while maintaining platform stability.



- Considering the business-critical nature of these upgrades, **Winfo** has established a comprehensive Release Management methodology.
- Our process ensures that your Salesforce org remains stable, compliant, and fully optimized while enabling smooth adoption of new features with minimal disruption.
- We proactively perform **impact analysis, sandbox regression testing, integration validations, and business-aligned readiness assessments** to ensure that the transition into each release cycle is predictable and risk-free.

Governance Structure

Winfo uses a Three-layer management structure to ensure the success of the program; the layers are Strategic, Tactical and Operational. This is a Metrics based, multi-level governance model to ensure transparency in management and communication at Strategic, Tactical and Operational levels.



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Thank you!



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