

# OPTIMIZE YOUR INVESTMENT IN SALESFORCE

**CRM Integration.** For data enrichment, cleansing, and relationship management.

BoardEx integrates with Salesforce.

The BoardEx Salesforce app, which is available in the AppExchange, enhances your existing Salesforce experience. Deeper integration with BoardEx provides insight into the ways you can connect with the people and companies you want to reach. Centralize your workflow in Salesforce with added value from the BoardEx network.

The screenshot shows the Salesforce interface for a contact named Andrew Rashbass. The 'BoardEx' tab is active, displaying a profile card with fields for Nationality (British), Age (53), and Date of Birth (16 Jul 1965). Below this is a 'Ways to Connect' section showing a network diagram with nodes for Michael Abrahams, Jeffrey (Jeff) G Davis, and Andrew Rashbass. The 'Employment' section lists current employment with a table:

ORGANIZATION	ORG TYPE	ROLE	START DATE
EUROMONEY INSTITUTIONAL INVESTOR PLC (Euromoney Publications PLC prior to 04/1999)	Public	CEO (Brd - ED)	18 Nov 2015
EII Holdings Inc	Private	Director - SD (Brd - SD)	

Integrating BoardEx into Salesforce allows you to seamlessly connect with **1.3+ million individuals across 1.9+ million organizations.**

Seeing your firm's activity alongside BoardEx data will **show you any active relationships** that link your organization to your Opportunities, Contacts, Leads and Accounts.

## ENRICH AND CLEANSE THE DATA ON INDIVIDUALS AND ORGANIZATIONS IN SALESFORCE FOR EFFECTIVE RELATIONSHIP MANAGEMENT

Map your organization's relationships to the individuals and organizations you want to target to gain deeper insight on the organizations within your CRM.

BoardEx company profiles show the board of directors, C-suite and senior leadership teams, when available.

Gather up-to-date information about your clients and prospects to complement the data in your Salesforce instance.

Dedicated product technical support team to maintain ongoing operational excellence for all BoardEx integration clients.

### FOR MORE INFORMATION

CONTACT YOUR ACCOUNT MANAGER | SALES@BOARDEX.COM | CORP.BOARDEX.COM