



Prudence B2B

Transforming Industries, Empowering Communities



800 Park Offices Dr, Suite 3317
Research Triangle Park, NC 27709, USA



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www.prudenceb2b.com

SALESFORCE CAPABILITY STATEMENT

Salesforce expertise that turns focused needs into measurable progress.

Consulting, delivery, and managed services for nonprofits, consulting partners, and growing organizations.

Prudence B2B helps organizations assess, improve, implement, and support Salesforce through a senior-led model built around clear scope, disciplined delivery, and accountable outcomes.

FOCUSED ENGAGEMENTS

Health checks, improvement sprints, discovery, data, implementation, and managed support.

SENIOR-LED DELIVERY

Direct leadership with specialized Salesforce consultants available on demand.

FLEXIBLE PARTNERSHIP

Direct client engagements, subcontract delivery, and white-label support for Salesforce partners.

Core Salesforce capabilities

Consulting & Delivery

- Discovery, stakeholder workshops, requirements, roadmaps, and solution planning
- Sales Cloud, Service Cloud, Experience Cloud, Nonprofit Cloud/NPSP, CPQ, and Agentforce
- Configuration, automation, security, reporting, dashboards, and user experience improvements
- Data migration, cleanup, mapping, validation, reconciliation, and integration coordination
- Testing, UAT, training, documentation, deployment readiness, and adoption support

Managed & Partner Services

- Fractional Salesforce administration and enhancement backlog support
- Flow troubleshooting, permissions, data imports, reports, release support, and documentation
- White-label delivery capacity for Salesforce consulting partners
- Temporary project leadership, business analysis, testing, data, and implementation support
- Flexible monthly packages supported by senior oversight and qualified on-demand specialists

Why Prudence B2B

Practical entry points

Begin with a defined health check, improvement sprint, or monthly support package.

Nonprofit experience

Fundraising, donor, volunteer, program, application, and constituent-management processes.

Commercial process expertise

Lead-to-opportunity, configurable offerings, quote, proposal, contract, and e-signature workflows.

Delivery discipline

Clear scope, assumptions, priorities, documentation, testing, and decision tracking.

Contracting readiness

HUBZone, NMSDC MBE, UEI, CAGE, multiple NAICS codes, and active registrations.

Quality & security

ISO 9001 and ISO 27001 certifications valid through December 14, 2028.



Prudence B2B, LLC
NC SOSID: 2395132
UEI: Q35NE2L3YPH7
CAGE: 9EV82



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Salesforce
Consulting
Partner



ISO 27001
Certified



ISO 9001
Certified



Salesforce
AppExchange
Partner



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REPRESENTATIVE EXPERIENCE

Selected Salesforce engagements

Regional Nonprofit Healthcare & Hospice Organization

SUBCONTRACTED SALESFORCE DELIVERY

Supported Salesforce Nonprofit Cloud modernization and CRM consolidation across multiple affiliated organizations. Work included fundraising operations, donor and household strategy, migration planning, testing, training, reporting, and adoption readiness. Architected a Salesforce-native batch gift entry process with templates, validations, duplicate detection, gift creation, status tracking, audit history, and dashboards.

Green Cosmos Zambia

PRO BONO PRUDENCE B2B ENGAGEMENT

Implemented Salesforce NPSP to manage volunteers, training programs, board applications, and volunteer applications. Integrated Jotform with Salesforce to improve data collection and reduce manual entry while establishing a stronger foundation for program and volunteer reporting.

Growing Home Services Company

PAID DIRECT PRUDENCE B2B ENGAGEMENT

Implemented Salesforce Sales Cloud so service agents could engage clients, select customized products and service offerings, and progress opportunities through tailored lead and sales processes. Integrated DocuSign to generate quotes, proposals, contracts, and electronic-signature workflows.

Easy ways to begin

SALESFORCE HEALTH CHECK

\$2,000 starting price

7-10 business days

Assessment, findings report, prioritized roadmap, high-level estimate, and findings presentation.

MONTHLY SUPPORT

\$1,500 starting monthly

10, 20, or 40 hours

Administration, troubleshooting, reports, data, minor enhancements, documentation, and backlog management.

FOCUSED PROJECTS

\$2,000-\$25,000 preferred

Scope-based

Discovery, implementation, improvement sprints, migration, integration, testing, training, and partner delivery support.

Corporate & contracting information

Legal name: Prudence B2B, LLC

UEI / CAGE: Q35NE2L3YPH7 / 9EV82

NAICS: 541511, 541512, 541519, 541618, 541690

Registrations: Active HUBZone, NMSDC MBE, and USAID registration/partner status

Salesforce ecosystem: Certified Consulting Services Partner (CSP), Independent Software Vendor (ISV), and Managed Services Partner (MSP)

ISO certifications: ISO 27001: QCC/9BEF/1225; ISO 9001: QCC/8ECF/1225; both expire 12/14/2028

Let's identify the right first Salesforce engagement.

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