

Delivering Salesforce Powered Next Generation Appleton's CRM Platform with Eficens

Customer Success and Co-Innovation Showcase

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Our President and Chief Executive Officer, Doug Chamberlain always says that customer centricity is the core of what we do at [Appleton Partners, Inc.](#) We take pride in the strength and durability of our client relationships. Our culture defines who we are and how we operate. With integrity, commitment and collaboration, we aim to meet the individual objectives of every client in a highly personalized and customized manner.

As a fiduciary and joint custodian of our clients' success, we deliver on our client commitments through world class services, powered by advanced technology innovations.

In the beginning of 2024, we embarked on an audacious project to build a next generation Client Relationship and Lifecycle Management Platform (CRLMP), leveraging Salesforce with our technology partner [Eficens Systems, Inc.](#) – a global technology solutions and services company.



Punit Shetty, CTO – Appleton Partners, Inc.



I am extremely proud of the work done by my technology team with the Eficens engineers to truly co-innovate and successfully deliver this next-gen CRLM platform for Appleton Partners. This unified platform with simple UI and advanced workflow has afforded numerous benefits for us, in managing end-to-end client prospecting, sales and marketing, onboarding and investment services. It's an easy, powerful, collaborative and insightful platform for our financial advisors, helping them manage client relationships, build their book of business, streamline their practice and handle compliance challenges.

This has become a single system for all client interactions, eliminating the need for sales and front/middle office staff to interact with multiple books of record for customer 360 and lifecycle management. With real time integration with transactional and accounting systems, this data powered platform has the potential to meaningfully expand our business.

I am very impressed with the Eficens Systems global workforce, as they demonstrate deep technical acumen and financial domain knowledge and look forward to an expanded engagement as we explore the possibility of introducing next generation generative AI capabilities to our data foundation.

Creating enduring value for our clients through technology powered products and services innovations are true differentiators for us, and I am very excited about what the future holds with the right business and technology partner ecosystem.

Punit Shetty

Chief Technology Officer, Managing Director of IT & Operations

Eficens Systems

[email us here](#)

Prathyusha Venigandla

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