

SALESFORCE, DATA & AI MODERNIZATION FOR FEDERAL MISSIONS

Certified Woman-Owned Small Business. Salesforce partner since 2015.

WOSB
SBA CERTIFIED

Salesforce Partner
SINCE 2015 · 170+ CERTS

SOC 2 Type II
AUDITED BY A-LIGN

GSA Schedule
THROUGH CARAHSOFT

CAPABILITIES

The CRM Firm helps agencies modernize constituent, employee, and operational experiences through Salesforce, data, integration, and AI. We pair technical delivery with communications and change management, so the systems we build get used.

CORE COMPETENCIES

SALESFORCE CONSULTING

Service, Experience,
and Marketing Cloud

DATA & AI MODERNIZATION

Governance, analytics,
AI readiness

DIGITAL TRANSFORMATION

Case, grants, intake, portals

CRM MODERNIZATION

Legacy and over-
customized systems

SYSTEMS INTEGRATION

APIs and data migration

PROGRAM DELIVERY

PMO, training, change
communications

PAST PERFORMANCE

- 01 Healthcare Compliance Technology Organization**
Salesforce modernization, certification-review automation, portal, integrations, and reporting in a regulated environment.
- 02 National Professional Association**
Membership and constituent management, Experience Cloud portal, integrations, UAT, and training.
- 03 K-12 Education Organization**
Enrollment workflows and digital engagement on Experience Cloud and Marketing Cloud.
- 04 Medical-Technology Manufacturer**
Phased customer-portal modernization: secure access, case and order visibility, multilingual, AI self-service readiness.
- 05 Mission-Driven Food-Access Nonprofit**
Salesforce-to-Tableau analytics, reporting foundations, and knowledge transfer.

Client references available on request, with client authorization.

DIFFERENTIATORS

Technology + communications
under one roof

Senior-led delivery from strategy
through adoption

Regulated-industry experience in
healthcare, finance, and life sciences

AI with purpose, tied to
mission outcomes

COMPANY DATA

LEGAL NAME	The CRM Firm, Inc.
LOCATION	Broomfield, Colorado
FOUNDED	2015
UEI	MZE9WKSGFYG7
CAGE	7XFQ3
BUSINESS SIZE	Small · WOSB
VEHICLE	GSA Schedule via Carahsoft

NAICS (primary in bold)

541512	518210	519290	541490
541511	541513	541519	541611
541613	541618	541690	541910
541990	561410	561499	611420
611430	611710		

PSC

DA01	DA10	DD01	DF01	DF10
DH01	DH10	DJ01	R406	R408
R410	R422	R425	R426	R499
U001	U008			