

TECHNOLOGY MATTERS.

THE MISSION MATTERS MORE.

Salesforce, data, integration, and AI for government agencies and regulated organizations.

2015

SALESFORCE
PARTNER SINCE

30–50

EMPLOYEES +
SUBCONTRACTORS

170+

SALESFORCE
CERTIFICATIONS

WOSB · SOC 2

SBA CERTIFIED · TYPE II

WHO WE ARE

The CRM Firm (CRM F) is a woman-owned Salesforce consulting partner in Broomfield, Colorado. Since 2015 we have helped regulated and mission-driven organizations modernize the systems their staff and constituents use. Every engagement pairs technical delivery with communications, training, and change management, because a system only improves the mission when people use it.

MISSION

Help organizations spend more time on their mission and less time managing systems.

VISION

Public services that are fast, connected, and trusted by the people they serve.

SERVICE OFFERINGS

Salesforce Implementation.
Service, Experience,
Marketing Cloud

Workflow Automation.
Tracked, auditable processes

Data & Analytics. Governance,
Data Cloud, Tableau

Program Management. PMO,
UAT, release management

CRM Modernization. Health
& Security Check, TOUR

Integration & Migration.
Legacy and cloud systems

AI Readiness. Assessments,
governance, Agentforce

Communications & Adoption.
Training and outreach

REPRESENTATIVE EXPERIENCE

Anonymized to protect client confidentiality. References available with client authorization.

- 01 Healthcare Compliance Technology Organization.** Salesforce modernization, review automation, and integrations.
- 02 National Professional Association.** Constituent management, portal, and training.
- 03 K-12 Education Organization.** Enrollment workflows and digital engagement.
- 04 Medical-Technology Manufacturer.** Secure customer-portal modernization.
- 05 Mission-Driven Food-Access Nonprofit.** Tableau analytics and knowledge transfer.

LEADERSHIP



Stephanie Hagan
CEO & FOUNDER

Stephanie Hagan is the founder and CEO of The CRM Firm, bringing more than two decades of experience in Salesforce, CRM strategy, implementation, systems integration, and business-process transformation. At CRM F, she leads company strategy, team development, and the design of practical, scalable CRM solutions that help organizations modernize operations and improve adoption.

MARKETS SERVED

State & Local Government · K-12 Education
· Health & Human Services · Healthcare &
Life Sciences · Professional Associations
· Nonprofits · Financial Services

PARTNERSHIP ECOSYSTEM

Salesforce. Partner since 2015
Carahsoft. GSA Schedule access
A-LIGN. SOC 2 Type II auditor

COMPANY DATA

Legal Name	The CRM Firm, Inc.
UEI	MZE9WKSIFYG7
CAGE	7XFQ3
Primary NAICS	541512
Vehicle	GSA via Carahsoft