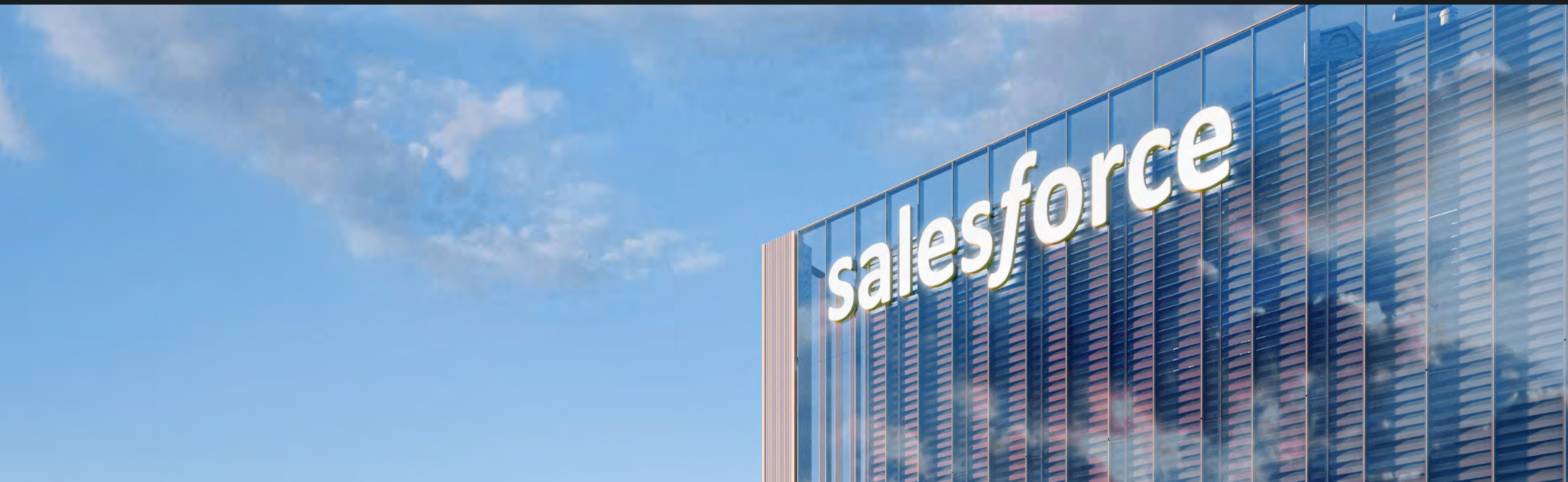


The Salesforce Optimization Playbook: From Pain Points to Performance

Audience : CEO, CFO, CSO, COO, VP/Director of Operations

trajectory



IS YOUR SALESFORCE INSTANCE A GROWTH ENGINE OR A ROADBLOCK?

As a C-suite executive, you've made a significant investment in Salesforce, expecting it to be a catalyst for growth. But is it delivering on that promise? For many organizations, the reality is that their Salesforce instance has become a complex web of technical debt, inefficient processes, and stagnant performance. This leads to frustrated users, inaccurate data, and missed opportunities.

Common pain points for executives like you include:

- **Poor sales pipeline management:** Resulting in missed opportunities and lost revenue.
- **Inadequate customer data management:** Leading to poor customer experiences and a decline in loyalty.
- **Limited visibility into business processes:** Causing inefficiencies, delays, and a lack of accountability.
- **Manual processes and workflows:** Resulting in errors, decreased productivity, and higher costs.

The good news is that these challenges can be overcome. With the right strategy, your Salesforce instance can be transformed from a roadblock into a high-performance growth engine.



THE PATH TO OPTIMIZATION: CONFIGURATION, AI & ACCELERATORS

Optimizing your Salesforce instance doesn't have to be a massive, disruptive overhaul. A strategic approach that combines configuration updates, AI-powered assessments, and specialized accelerator tools can deliver significant results quickly.

Here's how we approach it:

- **Continuous Optimization with Trajectory Managed Services:** Our team of experts will work with you to enhance system performance by optimizing workflows, user roles, and customizations. We'll also expand your reporting capabilities, KPIs, and dashboards, and reassess your system architecture to ensure scalability.
- **AI Assessment & Execution:** We analyze your current Salesforce configuration, identify areas for improvement, and automate repetitive tasks. Our AI-powered "intelligent accelerators" can automate record creation from PDFs, analyze custom code, and even provide real-time, conversational support to your users.
- **Initus Accelerator Tools:** These powerful tools are designed to solve specific Salesforce challenges, such as data quality issues, complex integrations, and user adoption resistance. By implementing these accelerators, you can quickly address your most pressing pain points and unlock the full potential of your Salesforce investment.



THE BUSINESS IMPACT: WHAT OPTIMIZATION MEANS FOR YOUR BOTTOM LINE

By optimizing your Salesforce instance, you can expect to see a significant impact on your key business metrics. Our clients have experienced:

- **Increased revenue:** Through improved sales pipeline management and a better understanding of customer data.
- **Reduced costs:** By automating manual processes, improving data quality, and eliminating inefficiencies.
- **Enhanced customer loyalty:** By delivering a more personalized and consistent customer experience.
- **Improved decision-making:** With real-time visibility into business processes and performance.



THE 90-DAY SALESFORCE OPTIMIZATION PLAN

Your Roadmap to a High-Performance Salesforce Instance

You've identified the need for Salesforce optimization and are ready to take action. This 90-day implementation plan provides a clear, actionable roadmap to transform your Salesforce platform from a source of frustration into a powerful engine for growth, ensuring a return on your investment.

Phase 1: Days 1-30 (Weeks 1-4) - Assessment & Strategic Planning

The foundational first month is dedicated to a deep-dive analysis and creating a strategic roadmap tailored to your specific business outcomes.

- **Weeks 1-2: Assessment & Stakeholder Discovery:** We perform a comprehensive analysis of your Salesforce configuration, identifying technical debt, security vulnerabilities, and areas of inefficiency. Concurrently, we interview key stakeholders across your organization to understand their pain points, operational challenges, and strategic goals.
- **Weeks 3-4: Roadmap Development & Prioritization:** Based on the technical assessment and stakeholder feedback, we develop a detailed 90-day roadmap. This strategic document outlines prioritized optimizations, clear timelines, defined success metrics (KPIs), and the expected business impact for each initiative.



Phase 2: Days 31-60 (Weeks 5-8) - Agile Implementation & Configuration

With a clear and approved roadmap, we move into the execution phase, focusing on agile implementation to deliver value quickly.

- **Weeks 5-6: Core Configuration & Initus Accelerator Deployment:** Our team begins implementing the prioritized configuration changes and workflow automations. We also deploy our powerful Initus accelerator tools to rapidly address your most pressing challenges, such as data quality, user adoption, or process bottlenecks.
- **Weeks 7-8: Integration, Quality Assurance & Testing:** We finalize system integrations with other business-critical applications. This period is dedicated to rigorous quality assurance and user acceptance testing (UAT) to ensure all new configurations and tools function flawlessly and meet your business requirements.

Phase 3: Days 61-90 (Weeks 9-12) - User Adoption & Continuous Optimization

The final month is focused on empowering your team, managing a smooth transition, and establishing a framework for long-term success.

- **Weeks 9-10: User Training & Go-Live:** We conduct training to ensure your team has the skills and confidence to leverage the newly optimized system. We then manage the go-live process, providing dedicated support to ensure a seamless transition with minimal business disruption.
- **Weeks 11-12: Performance Monitoring & Hand-off:** Post-launch, we closely monitor system performance and user adoption against the KPIs defined in Phase 1. We address any immediate issues, refine processes based on real-world usage, and formally hand off the system to your team, establishing the foundation for our continuous optimization managed services.

By following this structured 90-day plan, you can be confident that you are not just making technical changes, but driving meaningful business transformation that impacts your bottom line.



For growth-focused teams and Private Equity sponsors, Trajectory delivers client-centric enterprise application solutions across Salesforce, NetSuite, Integrations, and AI, bridging pre-acquisition due diligence with scalable post-acquisition execution. We blend strategic clarity with hands-on delivery, ensuring operational value from day one. With a global presence, we bring 18+ years of experience and have completed over 450 successful implementations.

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