



Business Process & Strategic Roadmap



Process

- Principal consultant engaged for business process reviews, including discovery interviews with admins, users, department stakeholders and executives
- In-depth assessment of strategic challenges and opportunities across organization
- Onsite presentation of CRM Roadmap Report to executives
- Actionable multi-phase strategy and ROI timeline with business benefit vs. effort and cost analysis



Prioritization: identify the most critical areas to target based on level of effort and estimated business impact



Key Recommendations: present detailed plan of necessary activities to address improvement opportunities



Cost Analysis: build a solid business case with estimated ROI, payback timeline and risks



Process & Functionality Optimization: detailed flows and maps for aligning more efficient processes and features for your specific operations model



Impact Roadmap: strategic guide outlining how to get more out of Salesforce long-term based on your ongoing and changing business needs



Detailed Action Plan: deliver in-depth next steps and actions items for achieving goals in the most cost and time-efficient manner with little to no disruption of current setup