Success

DATA SHEET · THE SALESFORCE RESET · A PROCESS AND ADOPTION REVIEW

Find out what's actually wrong before you spend another penny fixing it.

A process and adoption review of your Salesforce. A clear, written answer on why it isn't paying back, whether your sellers actually follow your sales process, what that is costing you, and what to fix first.

£1,000 · findings within 14 days · invoiced afterwards · full refund guarantee

1
conversation with whoever owns Salesforce, then a full review of your org

3
lenses: data discipline, your process (set up and followed), adoption and ownership

14
days to a written findings document, talked through with you

14
more days, from receiving it, to say it wasn't useful and get every penny back

Three things go wrong. We look at all three.

Data discipline

Duplicates, gaps and disputed reports. Whether the numbers can be trusted.

Process: set up and followed

Your playbook, or what your managers expect, becomes a short set of measurable rules. We check Salesforce is set up for them, then measure how often sellers follow them, with links to the records that don't. Read-only queries; nothing installed.

Adoption and ownership

Whether your team really uses it, who owns the system, who enforces it, and what happens when nobody does.

What you're actually buying

This is a process and adoption review, not a technical audit. It starts from how you sell and how your team uses Salesforce, and works back from there. Not a slide deck, not a 60-page technical inventory: a short, readable document, built from a review of your own system, that a leadership team can make a decision from. It is deliberately useful on its own: if you take it and fix things yourself, the Reset has done its job. If you'd rather we did the work, the findings become the scope. That is your call afterwards, not a condition of booking.

How it runs

1. **You book a time.**
   Straight into the calendar. No qualification call, no form first. Nothing is taken at booking.
2. **An hour to understand your business.**
   With whoever owns Salesforce, and ideally someone who sells with it. How you sell, where it hurts, what you have already tried.
3. **We review your Salesforce.**
   Where most of the work happens: your org against what you told us, how it is really used, where it creates friction for your sellers.
4. **You get it in writing, and we talk it through.**
   Within 14 days: what we found, what it's costing you, and what to fix in what order.

> "We moved to Salesforce after 2 failed CRM setups."
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> James Pursey · Founder & CEO · Replicate Labs. Most people who book a Reset have been let down before. That is why the first thing we do is look, not sell.

Isn't this just a Salesforce health check?
It goes further. A health check tells you whether Salesforce is configured cleanly. The Reset also checks it's set up for the way you sell, and whether your sellers follow that process, measured against your own rules. It is aimed at the person accountable for the commercial outcome, and it ends in a decision-ready document rather than a defect list.

Do we have to buy anything afterwards?
No. Plenty of what the findings flag, an in-house admin can fix. If you'd rather hand it over, Salesforce Simplified takes on that work. If the gap is that sellers aren't following the

process, Momentum puts your rules inside Salesforce so reps are prompted as they work.

What if it isn't useful?

Tell us within 14 days of receiving your findings and we refund the full £1,000. No conditions, no partial refunds calculated against time spent.

Stop guessing what's wrong with your Salesforce.

One conversation, a full review of your Salesforce and written findings within 14 days. £1,000, with a full refund guarantee.