what it costs, and the order in which to close it.

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If you only read this box

Salesforce rarely fails all at once. It drifts, in three predictable places: the data, the process, and the ownership. Spending on more licences, more automation or a new CRM before you have established what is actually wrong is guesswork, and applying AI to a drifting system makes the mess faster.

Pulling it back follows an order: establish the truth, realign rather than rebuild, restore the data, enable the team, then give the system an owner. The checklist at the end tells you how far your own org has drifted.

1 · THE PATTERN

Salesforce rarely fails all at once.

Nobody decides to break their CRM. A field gets added for one deal and never removed. A stage comes to mean something slightly different to two teams. A report is disputed once in a leadership meeting and quietly stops being used. Each change is small, reasonable and local. Together they accumulate into a system that reflects how it was installed, not how the business sells today.

By the time it is obvious, the symptoms are familiar: the Monday pipeline meeting has become an argument about whose numbers are right, a manager rebuilds the forecast by hand, and a rep keeps their real pipeline in a spreadsheet because the one in Salesforce doesn't match how they work. Usage falls, the data thins, and every gap hands the next person one more reason not to bother.

> Salespeople don't hate Salesforce.
> They hate friction.

One client's own users, in their own discovery workshop, put it in a single sentence before we had written a word: "The teams see real value in Salesforce but are being held back by friction." That is the normal starting point, not the exception. The teams were not the problem. The system had drifted away from them.

2 · WHERE IT LIVES

Drift has three addresses.

In every org we have opened, the drift sits in one or more of three places. They compound: bad data makes the process look wrong, a misaligned process produces bad data, and with nobody owning either, both get worse.

Data overload

Too many fields and no clarity on which ones matter, so people stop filling any of

them in. Duplicates, gaps and disputed reports follow.

What it costs: a forecast nobody will defend, and leadership decisions made from a spreadsheet instead of the system you pay for.

Process misalignment

The stages, fields and automation reflect how Salesforce was set up, not how your team actually sells. The team routes around it.

What it costs: adoption. Not because people are difficult, but because the system is asking for things nobody downstream ever reads.

Ownership gaps

Nobody's job is keeping Salesforce right, so nobody does. Every leaver takes context with them, and every joiner improvises.

What it costs: the first two problems, again, six months after anyone fixes them.

3 · THE EXPENSIVE MISTAKE

Spending before you know what's wrong.

When the problem becomes visible, the instinct is to spend: more licences, more automation, more consultancy, sometimes a whole new CRM. Most of that spend is guesswork, because nobody has established what is actually wrong. A new platform inherits the same process gap and the same absence of an owner, and drifts in exactly the same way. We hear "we moved to Salesforce after two failed CRM setups" more often than you would think.

AI makes this sharper, not easier. Agentforce and the tools now arriving alongside it are genuinely good at the write-ups, the re-keying and the chasing that eat a seller's day. But automation applied to a CRM that doesn't work yet just makes the mess faster. If the data is drifting and the process doesn't match how you sell, the AI learns the mess and accelerates it. AI belongs on foundations that hold. Check the ground first.

4 · THE ORDER OF WORK

Pulling it back, in the right order.

The sequence matters more than any individual step. Done out of order, each step undoes the one before it.

1 **Establish the truth of the system.**

Before any build, look. Across data discipline, process alignment and leadership ownership: what is actually there, what is actually used, what is actually wrong, and what it is costing. Write it down in plain English that a leadership team can make a decision from. One conversation with the person who owns Salesforce, then a review of the org against what they told you, is enough to get the picture. A health check tells you whether the system is configured cleanly; it won't tell you whether your team follows your process. Measure that too, against a short set of rules.

2 **Realign, don't rebuild.**

You have already paid for the platform. Start from the sales process and work back to the configuration. Fields that earn their place stay; stages mean one thing to everyone; automation serves the process rather than policing it. Where a decision belongs to the business rather than a consultant (what a stage means, who qualifies a lead), say so and wait for it, rather than building around the gap.

3 **Restore the data.**

Duplicates resolved, gaps closed, the disputed numbers that started the slide traced and fixed. The goal is not tidiness. It is a report the leadership team can put weight on, and a forecast someone will defend.

4 **Enable the team, then finish.**

Adoption is not enforced; it follows. A super user academy for internal champions, role-based rollout for everyone else, guidance that lives inside Salesforce where the work happens, and documentation that survives the consultant leaving. Scoped, delivered, finished.

5 **Give it an owner.**

Go-live is the starting condition, not the finish line. People join and improvise, people leave and take context with them, and the business changes faster than the system does. Someone has to review the org every month, ship the next improvement, and keep pipeline, forecast and process honest. Put the

rules inside Salesforce so reps are prompted at the point of work, not caught out at the pipeline review. If nobody internal owns that, rent the function rather than hoping.

5 · WHAT IT LOOKS LIKE WHEN IT WORKS

Three clients, with the working shown.

Figures without a basis are marketing. These have one.

8.1/10

The Torrington Group. 49 Salesforce licences across London, Frankfurt and Lyon. Before we started, every regional team scored Salesforce below the midpoint on whether it helped their daily work. After the super user academy and a three-country rollout, confidence scored 8.1 out of 10. Before any build, 44 requested changes were triaged: 17 minor fixes, 10 builds, 4 pieces of documentation, and 13 that were decisions for the business rather than configuration work, and were sent back as such.

£20m

Meyler Campbell. Realigning the system to the way the team worked surfaced £20m of previously unrecorded pipeline in the CRM. Adoption rose, and the licence moved up from Professional to Enterprise with additional seats. Their former CEO described a team "that had previously had a bad experience with Salesforce" being brought onside by fitting the system to their workflow.

60 → 15

Abacus Playgrounds. Field teams make around a thousand site visits a year, and each one took about an hour to write up in Salesforce. With Agentforce drafting the write-up from a narrated recording and a person approving it, each now takes about fifteen minutes. That is roughly 750 hours a year handed back to the field, on foundations that had been fixed first.

The drift checklist

Twelve questions. Tick the ones that are true of your org today. Be honest; nobody else is reading.

DATA DISCIPLINE

- [ ] Two people in a leadership meeting have disagreed about a Salesforce number in the last quarter.
- [ ] Someone rebuilds the forecast, or a board report, by hand in a spreadsheet.
- [ ] You could not say which ten fields on the Opportunity actually matter.
- [ ] You couldn't say what share of open opportunities have a next step dated in the future.

PROCESS ALIGNMENT

- [ ] At least one rep keeps their "real" pipeline somewhere other than Salesforce.
- [ ] Two teams would describe the same stage differently.
- [ ] Calls or meetings routinely go unlogged because the fields ask for things nobody reads.
- [ ] The last significant change to the sales process was never reflected in the system.

LEADERSHIP AND OWNERSHIP

- [ ] No single person's job description includes keeping Salesforce right.
- [ ] When the last admin or champion left, knowledge left with them.
- [ ] Nobody reviewed the org before the last Salesforce release landed.
- [ ] There is no written list of what is being fixed next.

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0 to 2 ticks: you are in good shape; give it an owner and keep it that way. **3 to 6:** drift is under way and is already costing you; establish the truth before spending. **7 or more:** the workarounds are the system. Stop spending on it until you know what is actually wrong.

Before you spend more, establish the truth of your system.

The Salesforce Reset is a process and adoption review of your Salesforce: one conversation with whoever owns it, a full review of the org, and a written findings document within 14 days: what we found, what it's costing you, and what to fix in what order. £1,000, invoiced afterwards, refunded in full within 14 days of receiving your findings if it isn't useful. The findings are written to be actionable without us.

Book a Reset at saassuccess.co.uk

Or bring a problem to the fortnightly drop-in clinic. Forty-five minutes, open agenda, no pitch.

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