



## INTRODUCING *FORWARD*: PROCESS EXPLORATION & OPTIMIZATION ADVISORY

Cloud Pathfinder Consulting offers our Forward service to help SaaS companies like yours navigate the future and achieve your business goals with Salesforce. We empower you to find the right way forward and make better, smarter decisions about the future state of your organization. The goal of every Forward engagement is to leave you with a clear plan for using Salesforce to future-proof your business and achieve long-term growth and success.

Cloud Pathfinder Consulting helps Salesforce customers leverage the technology to:



Automate outdated or repetitive processes



Easily access and effectively analyze data



Improve your high-value businesses processes



Optimize your processes to support your specific goals



Make smart, data-driven decisions for the future

### PROJECT SPOTLIGHT

We recently worked with a large commercial lighting software solutions company to develop an optimized Salesforce strategy. Our client handles most day-to-day Salesforce tasks in-house, but they needed our help to figure out how to use the available technology to empower their sales and marketing teams to make better decisions aimed at achieving specific business goals.

Our **Forward** service was exactly what they needed. They've engaged our team multiple times to advise on business process best practices for Pardot & CPQ, Territory Management and other Sales Cloud features.

### We provided strategic advice on:

- Structuring Sales Teams
- Identifying Stakeholders
- Scaling the Salesforce Org
- Shifting from Product-Based to Vertical-Driven
- Getting Sales & Marketing to Share Data & Collaborate

## COMPANIES WHO TRUST CPC TO MOVE THEM FORWARD WITH SALESFORCE



Our **Forward** advisory team takes you through an in-depth discovery process designed to quickly determine your desired outcomes and the actions we recommended to help you achieve them. After analyzing your current environment, we identify critical issues and provide a tailored, customized solution for addressing your needs and achieving your business goals.



### Goal Identification

- ▶ Determine whether you need to optimize business processes or improve technology usage
- ▶ Define your desired business outcomes

- ▶ Identify the most valuable functional areas for your business to focus on
- ▶ Explore how to leverage Salesforce to support your high-priority business goals and focus areas
- ▶ Identify key stakeholders for high-value focus areas
- ▶ Conduct focused discovery sessions to connect with stakeholders and end-users and better understand problems, root causes, and future improvement opportunities

### Workshop

### Analysis

- ▶ Compare your goals against your current processes & system landscape
- ▶ Determine how to best utilize Salesforce to achieve your goals

### Roadmap

- ▶ Provide detailed and actionable recommendations for:
  - Process Simplification & Automations
  - Accountability & Performance Monitoring
  - Salesforce Products, Features, Functionality & Integrations
  - Development Work Required
  - Deployment Timeline, Total Cost, and Cost Benefit Analysis

### Time Required from You

- ▶ 6-10 hours for SMBs
- ▶ 25-30 hours for Enterprises

### Key Stakeholders

- ▶ **VP Sales**, Customer Service Teams, **CFO, CIO**.
- ▶ We **encourage** you to bring along your power users!

### Cost

- ▶ starting at \$5,500 for SMBs
- ▶ starting at \$12,000 Enterprises

## SAAS COMPANIES RELY ON *FORWARD* TO EXPLORE & OPTIMIZES THESE PROCESSES

Measuring ARR & MRR

Managing Upsells & Renewals on Subscriptions

Measuring Customer Success Metrics

Recurring Revenue & Subscription Business Models

Managing Customer Churn

New Customer Onboarding

Forecasting Pipeline & Revenue

Measuring Marketing Attribution

Integrations with Selling Tools

Improving Customer Experience

## WHY CPC

Our team's military experience influences how we approach all client challenges, and our deep software and technology expertise means we understand the nuances, challenges, and language of your industry. We're committed to precision execution, outstanding customer support, and helping you find the best way forward with Salesforce.

