



INTRODUCING *TECHMAP*: TECHNICAL ASSESSMENT & OPTIMIZATION ADVISORY WORKSHOP

Cloud Pathfinder Consulting offers our *TechMap* technology advisory services to help high-tech companies like yours ensure your Salesforce implementation (and the rest of your tech stack) is optimized and ready to help you achieve your business goals.

As a SaaS professional, you're well aware of the staggering number of cutting-edge technology tools available to help you run and grow your business. You also know how easy it is to end up with solutions that aren't right for you — or that don't work as expected.

We help you avoid this frustrating scenario with a thorough assessment of both your Salesforce implementation and the surrounding tech set — complete with detailed recommendations for how to optimize and improve your system. Our goal is to help you map and create a sales, marketing, and customer service technology base you can trust to support your short-term goals and build on to power your long-term growth and success.

YOU KNOW WHERE YOU WANT YOUR SAAS BUSINESS TO GO. WE KNOW HOW TO MAKE SURE YOUR SALESFORCE SOLUTION IS READY TO GET YOU THERE.

Cloud Pathfinder Consulting's *TechMap* service helps you evaluate your SaaS business's tech stack and Salesforce implementation to:



Apply proven best practices



Spot technical faults



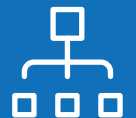
Eliminate unnecessary & redundant tools



Optimize for maximum performance, value, and ROI



Ensure data integrity and quality



Plan and build a scalable technology foundation to enable support data-driven decisions and long-term growth

TECHMAP PROJECT SPOTLIGHT

We recently worked with a growing “failure as a service” platform provider to streamline their tech stack and optimize Salesforce to support their current and future business needs. The company had too many tools in their tech stack and not enough strategy or optimization. The lack of strategy was slowing down their sales operations and growth.

TechMap was exactly what they needed to identify critical tools, functionality, and business priorities and develop a technology roadmap to support their sales initiatives and growth targets.

We provided strategic advice on:

- Techset strategy
- Leveraging SF in a recurring revenue business model
- Identifying critical tools, processes & integrations
- Optimizing SF to support business priorities
- Best practices for using SF to boost sales operations

TECHMAP PROCESS DETAILS

Our *TechMap* advisory team guides you through a strategic technical assessment process designed to reduce risk, maximize value, and power operational excellence. We focus on understanding your pain points and goals and providing recommendations to optimize your Salesforce implementation and associated tech stack to solve your problems and get the results you need.

1 DISCOVERY

- ▶ Define key business pain points and desired outcomes across business lines (not just sales & marketing)
- ▶ Identify the best technical solutions to achieve your goals & maximize business value

2 ANALYSIS

- ▶ Comprehensive evaluation of existing Salesforce implementation including user roles, Visualforce pages, integrations, automations, customization, and admin configuration.
- ▶ Data management assessment to check for duplicates and other data quality issues.
- ▶ Tech stack appraisal to identify opportunities to streamline and consolidate tools.

3 TECHMAP RECOMMENDATIONS

- ▶ Provide detailed and actionable recommendations for how to improve your system & create a technology base that supports your goals.
- Recommendations include:
- Technical Fault Corrections & Configuration Improvements
 - Workflow Implementation, Automation & Simplification
 - Data Quality Management Best Practices
 - Streamlined Tech Stack Suggestions
 - Salesforce Products, Features, Functionality & Integrations
 - Development Work Required to Optimize Tech Stack
 - Deployment Timeline, Total Cost, and Cost Benefit Analysis

4 GROWTH ASSESSMENT

- ▶ Evaluate storage capacity & scalability of technical solutions
- ▶ Suggestions to optimize your tech stack for long-term growth

Time Required from You

- ▶ Time requirement varies based on tech stack complexity
- ▶ Minimum 6 - 10 hours of key stakeholder engagement

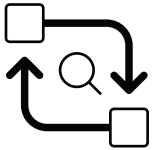
Key Stakeholders

- ▶ VP Sales, CIO, CTO, CMO, CFO, CRO, Product Leads, Sales Operations, Revenue Operations & Customer Service Teams
- ▶ We **encourage** you to bring along business experts & power users!

Cost

- ▶ Starts at \$4500
- ▶ Cost varies based on tech stack complexity

TECHMAP OUTCOMES FOR SAAS COMPANIES



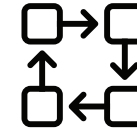
Clear connection between business objectives and supporting tools



Fit-for-purpose Salesforce implementation ready to address your challenges



Maximum ROI from your Salesforce investment



Streamlined tech stack with no fluff — just the tools you need to get the job done



Optimized technical foundation to support your business goals

WHY CPC

Our team's military background influences how we approach all client challenges, and our deep software and technology expertise means we understand the nuances, challenges, and language of the industry. We're committed to precision execution, outstanding customer support, continuous innovation, and helping our clients build a **TechMap** to power long-term growth and success.



Contact Jud Price at jud@cloudpathfinderconsulting.com for more information.

