



QUADRANT'S SALESFORCE PRACTICE AND STRATEGY

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Executive Summary

The document focuses on creating a high-level business plan for Quadrant to establish Salesforce practice and the strategy to scale it. The plan initially focuses on building capability in the following Salesforce products viz., Sales Cloud and Revenue Cloud and establishing direct Salesforce partnership. Also recommends partnerships with top and mid-level existing Salesforce Partners.

A 30-60-90-day plan highlights the activities and targets that focus on creating capability, capacity, stronger partnerships and customer acquisitions and PR.

Salesforce Partner landscape

Salesforce Partners

Below are the top 5 Salesforce partners globally where Salesforce has established strategic and continuous engagement with them

Company	Key Offerings and Expertise
Accenture	Generative AI Hub: \$3B investment in AI capabilities, dedicated Generative AI studios for CRM Industry Solutions: Financial Services, Healthcare, Retail, Manufacturing, Telco Cloud Expertise: Sales Cloud, Service Cloud, Marketing Cloud, Revenue Cloud, Data Cloud
Deloitte Digital	Agentforce Specialization: Recently expanded alliance (March 2025) focusing on agentic AI Industry Focus: Financial Services Cloud, Health Cloud, Manufacturing Cloud
PwC	Watson AI Integration: Combining IBM Watson with Einstein AI Industry Solutions: Banking, Insurance, Supply Chain, Healthcare
Capgemini	Digital Engineering: Focus on custom Salesforce development & Lightning Web Components Industry Verticals: BFSI, Healthcare, Retail, Communications
Cognizant	Customer-Centric Approach: Known for collaborative, agile delivery Sweet Spot: Mid-market and high-growth companies

Below are the top 5 next level Salesforce partners globally who offer consulting services and/or are ISV partners also

Partner	Key Offerings & Expertise
Routine Automation	Known for streamlining workflows and automating routine CRM tasks. Strong in Sales Cloud and Service Cloud setups.
Algoworks	Combines Salesforce CRM with digital marketing strategies. Offers Sales Cloud, CPQ, and Marketing Cloud implementations.
Synebo	Specializes in custom Salesforce development and UI/UX design. Offers Lightning Web Components and AppExchange apps.
Ascendix Technologies	Focuses on real estate and financial services CRM. Offers tailored Salesforce solutions and integration with external platforms.
Cynoteck	Strong in mid-market CPQ and Revenue Cloud projects. Known for agile delivery and post-launch support.

Below are the top 5 start-up level Salesforce partners globally who can be our potential competitors who we must observe their offerings, growth and strategy and make our plans flexible. We should target to reach their achievement levels initially to have visibility into the Salesforce customer base

Partner	Key Offerings & Expertise
Coastal Cloud	Custom Salesforce solutions across industries. Strong in AI, Data Cloud, and analytics. Over 7,000 successful projects.
Philodesign Technologies	Specializes in Salesforce implementation, customization, and integration. Focused on process optimization and customer experience.
Zivoke	End-to-end Salesforce services including consulting, integration, and support. Strong in lead management and marketing automation.
Teqfocus	Offers AI-driven Salesforce solutions with TeqNext AI and TeqAnalytics. Focused on digital transformation and automation.
Silver Softworks	Summit-tier partner with 500+ successful projects. Known for strategic CRM implementation and ongoing managed services.

Below are the top 5 Sales Cloud and Revenue Cloud partners who may want to network, establish initial partnerships with a possibility to provide augmented consulting services

- **Ksolves, Capgemini, Accenture, Deloitte Digital and Algoworks**
- These partners are recognized for their ability to
 - Deliver scalable Sales Cloud and Revenue Cloud implementations
 - Integrate CPQ, billing, and automation workflows
 - Provide strategic consulting and post-launch support
 - Drive measurable ROI through Salesforce technologies

Our Offerings and Focus Verticals

As Quadrant, our offerings initially will be Salesforce consulting services in Sales Cloud and Revenue Cloud. The key purpose most of the customers are using these Salesforce products is to

- Streamline Sales Processes
- Improve Revenue Management
- Enhance Customer Experience and Engagement

These can be the potential future offerings as we expand

- **Salesforce Implementations** – Build and Implement custom solutions
- **Modernization** – Support organizations in their modernization journey by analysing and understanding their business processes
- **Managed Services** – Support organizations already using Salesforce in leveraging and optimization the best of the platform
- **Engineering and Integration Services** – Support Organizations and streamline processes with their core business activities and bring in expertise into multiple other application integrations

These are top verticals Salesforce is being implemented for Sales Cloud and Revenue Cloud. We can finalize on the target market and verticals. (Topic for discussion)

- Technology
- Manufacturing
- Retail
- Automotive
- Telecom

Salesforce Partnership Program

Below is a detailed breakdown of the different levels of partnership and the credentials required

Tier Level	Certification Points Required	Typical Company Profile
Base	100-999 points	New partners, boutique consultancies (1-10 consultants) with salesforce certifications (Sales, Service and Developer I & II)
Ridge	1,000-4,999 points	Growing firms (10-50 consultants), regional players with salesforce certification plus deliverables
Crest	5,000-19,999 points	Established mid-tier firms (50-200 consultants) with advance training credits and sales and service certifications
Summit	20,000+ points	Global system integrators (1,000+ consultants)

- The above Tier Level will be achieved based on points earned.
 - **Certifications:** 50-200 points per certification (varies sales, service and developer and revenue cloud type)
 - **Customer Projects:** 500-2,000 points per successful implementation
 - **Revenue Generation:** Points based on influenced/closed deals
 - **Customer Success:** CSAT scores, case studies, testimonials
 - **Specializations:** Bonus points for industry/product specializations
 - **Training Completion:** Trailhead badges, partner accreditations

Quadrant's Salesforce Strategy and Plan

Quadrant's strategy should take a two-prong approach initially viz.,

- Build Internal Salesforce Technical Capability and Capacity specific to shortlisted verticals
- Build Partnership with Salesforce and existing Salesforce top and mid-level Partners such as Accenture, Deloitte, Algoworks etc.,

In parallel, relationship establishment with potential customers should also progress rapidly

Below are the top points we should assess, execute and track timely before going full scale.

- Capability Building in Sales Cloud, Revenue Cloud
- Certified Salesforce Consultants
- Become a Salesforce Partner and scale
- Partnership with Top, Mid-level Salesforce Consulting, ISV partners

- Customer Acquisition
- Sales & Marketing

30-60-90 day Plan for Salesforce Journey

#	Activities	30 days	60 days	90 days
1	Capability Building in Sales Cloud, Revenue Cloud	<ul style="list-style-type: none"> • Hire at least 2 senior salesforce certified/non-certified experts • Hire at least 10, zero to 2 years' experience resources and train them 	<ul style="list-style-type: none"> • Build Sales Cloud, Revenue Cloud Vertical specific implementation capability leveraging seniors • Train and build junior resources expertise 	<ul style="list-style-type: none"> • Build Sales Cloud, Revenue Vertical specific implementation capability leveraging seniors. Build implementation playbooks, templates • Train the juniors in Sales Cloud and Revenue Cloud
2	Certified Salesforce Consultants	<ul style="list-style-type: none"> • Certification completion for 2 seniors 	<ul style="list-style-type: none"> • Certification completion for 5 juniors 	<ul style="list-style-type: none"> • Certification completion for 5 juniors
3	Become a Salesforce Partner and scale	<ul style="list-style-type: none"> • Initiate the partnership for BASE 	<ul style="list-style-type: none"> • Continue to be engaged in Salesforce partnership activities, conferences while capability is being built. • Encourage and facilitate everyone in the Salesforce team to achieve a 'Ranger' score in trailhead 	<ul style="list-style-type: none"> • Become a BASE partner and prepare for RIDGE partner
4	Partnership with Top, Mid-level Salesforce Consulting, ISV partners	<ul style="list-style-type: none"> • Connect with the Salesforce Community • Identify the Potential partners 	<ul style="list-style-type: none"> • Discuss on augmented support to partners • Work along with them on their potential opportunities/POCs 	<ul style="list-style-type: none"> • Get at least one mid-level consulting project
5	Direct Customer Acquisition	<ul style="list-style-type: none"> • Explore the market and network with potential customers 	<ul style="list-style-type: none"> • Continue to explore the market and network with potential customers • Understand customer requirements and initiate pro bono and paid POCs (To be discussed) 	<ul style="list-style-type: none"> • Continue to explore the market and network with potential customers • POCs • At least 1 customer acquisition

6	Sales & Marketing	<ul style="list-style-type: none"> • Prepare collaterals and initiate social media presence, sign up for salesforce communities, Create Sales Pipeline 	<ul style="list-style-type: none"> • Participate in events online/offline • Establish sales partnerships with exiting partners 	<ul style="list-style-type: none"> • Market the capabilities • Establish strong sales presence

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