

Scalable SaaS: Rethinking the  
Salesforce ISV Path

# CRU Use Case - Salesforce



## Client Overview

CRU Logistics is a niche logistics and rail transportation company with deep industry expertise and all operational intelligence centralized in Salesforce. To scale their operations, they envisioned turning their internal tool, BarrelCommand, into a SaaS platform.

### Industry

Logistics & Transportation

### Company Size

Small to Medium Business  
(SMB)

### Engagement Type

Discovery & Architecture

## The Turning Point

### Challenge

BarrelCommand was developed as a monolithic, internal Salesforce app using Apex, Lightning, and native storage. CRU wanted to explore turning it into a multi-tenant SaaS product via Salesforce's ISV model. However, they faced technical and operational challenges, such as multi-tenancy constraints, integration complexity (e.g., Railinc), and growing Salesforce costs.

### Solution

Equals II partnered with CRU to evaluate the ISV model feasibility, simulate the managed packaging and AppExchange publication process, analyze licensing and scaling implications, and compare it with a modern, cloud-native alternative on AWS.

# Equals II's Solution

During a 4-week discovery sprint, Equals II led the technical feasibility analysis, performed risk validations, and delivered a clear comparison between the Salesforce ISV model and a cloud-native SaaS architecture.



## ISV Simulation & Architecture Review

Decomposed BarrelCommand into a managed package.  
Simulated AppExchange flow and namespaced setup.  
Configured custom logic, objects, and permissions.



## Licensing & Operational Cost Analysis

Estimated user and app costs, including storage and APIs.  
Accounted for AppExchange's 15% revenue share.  
Modeled cost impact for CRU and its clients.



## Risk & Performance Assessment

Ran PoCs for Railinc API and file storage.  
Validated multi-tenant logic and CI/CD readiness.  
De-risked core technical assumptions.



## Platform Tradeoff Analysis

Compared Salesforce ISV vs. cloud-native approach.  
Mapped tradeoffs in scalability, UX, and cost.  
Supported data-driven platform decisions.

# Implementation Strategy

Equals II applied its proven discovery framework to assess whether CRU's Salesforce-based system could evolve into a scalable SaaS product. The process combined business alignment, technical validation, and strategic roadmap definition to guide CRU toward the most viable platform approach.

## Discovery Phase

Led workshops with CRU's leadership to align on the SaaS vision, understand business logic, and assess reuse potential from the existing Salesforce system (BarrelCommand).

## Technical Feasibility

Conducted deep technical analysis comparing Salesforce ISV and AWS architectures. Identified critical platform limitations and recommended a more scalable cloud-native path.

## Platform Roadmap Definition

Defined and prioritized MVP modules such as Fleet Management and Reporting. Designed a risk mitigation plan with PoCs to validate integrations, multi-tenancy, and performance.



# Project Objectives

The primary goal of this initiative was to evaluate the feasibility of transforming CRU Logistics' internal Salesforce-based system (BarrelCommand) into a scalable, multi-tenant SaaS product. This required assessing the ISV model on Salesforce, estimating operational and architectural tradeoffs, and comparing it to a cloud-native alternative to support long-term growth.



## Assess ISV Feasibility

Evaluate whether BarrelCommand could be productized and distributed via AppExchange using Salesforce's ISV model.



## Estimate Cost & Architecture Fit

Analyze licensing, revenue share, storage, and tech scalability to assess the long-term viability of the ISV approach.



## Benchmark Against Cloud-Native

Compare the ISV model with a cloud-native alternative on AWS, factoring in UX flexibility, dev lifecycle, and scaling needs.

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# Key Findings & Strategic Tradeoffs

The primary goal of this initiative was to evaluate the feasibility of transforming CRU Logistics' internal Salesforce-based system (BarrelCommand) into a scalable, multi-tenant SaaS product. This required assessing the ISV model on Salesforce, estimating operational and architectural tradeoffs, and comparing it to a cloud-native alternative to support long-term growth.

We uncovered critical tradeoffs in cost, scalability, governance, and operational complexity between the Salesforce ISV model and a modern cloud-native architecture. These findings shaped the final platform recommendation.

## Architecture Limitations

Salesforce lacked native multi-tenancy and imposed governor limits, requiring custom logic and increasing technical debt.

## High Cost of Scale

Licensing, storage, APIs, and a 15% revenue share made long-term growth on Salesforce financially unsustainable.

## Operational Complexity

Manual versioning, per-client upgrades, and environment inconsistency slowed down release cycles and added risk.

## Strategic Advantages

Salesforce offered robust compliance, fast time-to-market via reuse, and low-code tools for quick iteration.

# Results & Business Impact

## ISV Model Evaluation

We assessed the feasibility of transforming BarrelCommand into a multi-tenant SaaS via Salesforce's ISV model.

## Platform Decomposition

The monolithic app was broken into a managed package with namespaced logic and custom objects.

## Modular MVP Foundation

We estimated user and app-level costs, including storage, APIs, and Salesforce's 15% revenue share.

## Risk Identification & Testing

Spikes and PoCs validated integration, multi-tenancy logic, and Salesforce technical limits.

## Cloud-Native Comparison

A full evaluation revealed better scalability, UX flexibility, and lifecycle control on AWS.

# Client testimonials

“

“ I'm going to tell you that just walking the path, being part of the discovery , has already brought us a lot of value. You've asked questions that forced us to make decisions and bring clarity to things that weren't yet defined.”

“

“Thank you for this checkpoint. I loved it. The effort and professionalism really shows. I'm very, very happy and excited about this project.”

“

“What a great process. Very professional. I truly appreciate it. I'm excited to read the final report and make the decisions needed to move forward. If the numbers and the plan make sense, we'll definitely keep working together.”

# Conclusion

The ISV model proved useful for fast-track delivery and compliance, but it lacked the scalability and cost-efficiency required for CRU's SaaS ambitions. Equals II recommended moving forward with a cloud-native solution, preserving Salesforce where valuable, while unlocking a modular, future-ready SaaS platform.



## Scalability

Delivered a clear migration path from Salesforce ISV to a scalable, cloud-native SaaS architecture on AWS.



## Clarity

Provided detailed tradeoff analysis between ISV and cloud-native models, enabling confident technical decisions.



## Efficiency

Streamlined feasibility validation and MVP definition, reducing technical uncertainty and upfront investment.



## Strategic Partnership

Equals II supported CRU as an embedded team, guiding architecture and product strategy.