

Salesforce By Design helps growth-stage and mid-market companies build a business application foundation that scales; not just technically, but operationally. We implement Salesforce with AI ready intent, trusted governance and guidance for improved adoption, scalability, and trust
— By Design.



Some Challenges We've Heard

- > Sales teams working outside current application due to unclear processes or poor adoption
- > Disconnected tools or spreadsheets creating duplicate work and inconsistent data
- > Service teams struggling with scheduling, routing priorities, or contracts
- > Manual steps between sales, finance, and delivery impacting cash flow
- > Delays in quoting, pricing, or invoicing caused by siloed systems and approvals
- > Incomplete dashboards and reports limiting time to insights



We Understand the Impact

When critical business applications isn't aligned to processes or adopted by teams:

- Leads fall through cracks, and pipeline discipline becomes harder to manage
- Manual work grows, creating inefficiencies and delays across departments
- Servicing customers takes more effort, and response times vary across teams
- Revenue recognition, invoicing, and renewals suffer from poor hand-offs
- Leadership loses confidence in data, limiting decision-making and growth strategy
- Scaling becomes painful instead of seamless; every new user, product, or region adds complexity



Use Cases We've Helped With

• Business Application & Platform Design

- > Implement Sales Cloud around your sales funnel and customer lifecycle.
- > Design service processes with intelligent routing, skills, and omni-channel support.
- > Set up Field Service and work orders for efficient scheduling, dispatch, and mobile teams.
- > Design Quote to Cash for predictable invoicing and margin visibility.

• Growth & Automation

- > Build workflows that remove repetitive manual work.
- > Automate approvals, renewals, and post-sale service handoffs.
- > Enable teams with plan-to-run documentation so they stay self-sufficient
- > Scale processes smoothly as teams, customers, and product lines grow.

• Administration and System Maintenance

- > Enabling real-time sync across sales, service, finance, and fulfillment
- > Connect ERP, accounting, marketing, and custom applications.
- > Implementing DevOps, deployment pipelines, and environment governance
- > Standardizing integrations to avoid API sprawl and dependency risk



Value Drivers and ROI Metrics

Revenue Predictability

Forecasts

You Can Defend vs. spreadsheet assumptions

Margin Visibility

60-75%

Quote-to-Cash Clarity not siloed approvals

Operational Alignment

One Platform

marketing, sales, service, and finance aligned

- Scalable Governance

AI Ready Architecture and governance models that prevent customization sprawl and future technical debt.

- Revenue Predictability

Clear pipeline hygiene, structured stages, and financial visibility that improve forecasting accuracy and leadership confidence.

- Margin Control

Standardized quoting, pricing governance, and approval workflows that protect margin and reduce revenue leakage.

- Sales-to-Service Continuity

Opportunities, contracts, and work orders connected in a single lifecycle, eliminating handoff friction.

- Executive Visibility

Dashboards and reporting designed for decision-making, not just activity tracking.

- Adoption That Sustains

Systems built around how teams operate; increasing long-term adoption and reducing shadow processes.

⚡ Flexible Options to Fit Your Goals

1. Project-based engagements

2. All-in Services (3–9 Month Partnership)



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