
Non-Profit Research Organization

Spinnaker Support transitioned the client to a managed services model, conducted strategic roadmap sessions, and executed a comprehensive Salesforce 'health check'. This approach streamlined processes, tackled technical debt, and bolstered security, enhancing operational efficiency and scalability.

INDUSTRY & ACCOUNT DETAIL:

Research

SECTOR: Non Profit

SERVICES PROVIDED

- Managed Services POD

ENVIRONMENT

- Sales Cloud
- Backlog Grooming / Sprint Planning
- Salesforce Health Check
- Salesforce Technology Assessment)

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CHALLENGE: STREAMLINING A SALESFORCE VISION

The client recognized untapped potential in their Salesforce instance, yet struggled to craft a roadmap that resonated with their envisioned future. Key challenges included a misaligned configuration of Salesforce, leading to suboptimal processes and metadata management. This, combined with a lack of internal expertise, left them unable to effectively address the accumulating technical debt, hindering their operational efficiency.

APPROACH: STRATEGIC PARTNERSHIP FOR SALESFORCE ENHANCEMENT

Adopting a managed services model, we established a strategic alliance with the client, focusing on enhancing their Salesforce experience. This transition involved introducing Agile methodologies for ongoing improvement. By conducting roadmap sessions, we delved deep into understanding their vision, involving stakeholder interviews, process mapping, and requirement gathering. This approach enabled us to create a comprehensive backlog of work that aligned with their objectives.

SOLUTION: SALESFORCE TRANSFORMATION AND TECHNICAL HEALTH CHECK

The considerable technical debt necessitated a thorough Salesforce 'health check', targeting areas deviating from best practices, including automations, Apex code, and security. Our solution encompassed a holistic approach to refine and optimize their Salesforce instance, addressing both existing challenges and setting the stage for future enhancements.

RESULTS: ENHANCED PRIORITIZATION AND ROBUST SECURITY

The client now possesses a prioritized backlog for Salesforce, encompassing both issues and enhancements, managed by our dedicated service team. Key achievements include the implementation of vital security updates, fortifying the system against potential disruptions and ensuring seamless operational continuity. This transformation not only addressed immediate concerns but also laid a foundation for sustained growth and efficiency.

Explore more success stories of companies benefiting from Spinnaker Support's software solutions.

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ABOUT US

Today's leaders are navigating an increasingly uncertain and ever-changing world. They can't be held back by restrictive, ineffective, or complicated software systems as they move their organizations forward. Spinnaker optimizes software ecosystems through services designed for sustainable transformation, maximizing software investments and freeing up the capital and resources leaders need to navigate the future with certainty.