



60-Day Revenue Execution Diagnostic + Ongoing Advisory For Salesforce ISV's

What I Do (and How I Do It)

I help Salesforce ISVs increase close rates by installing sales process rigor that allows sellers to **teach the value of being Salesforce-native, tailor that value to each buyer, and take control of complex buying cycles inside the Salesforce ecosystem.**

Most sellers conduct their cycles based on feature-function comparisons and pricing reductions, rather than focusing on the adoption leverage, business return and ecosystem alignment that should anchor the deal. A lack of teaching this value, tailoring it to the client and taking control of the conversation causes deals to drift, increases discounting and adds to your losses.

This engagement corrects that gap through disciplined sales execution—not messaging theory.

Step 1: Align on Outcomes, Buyers, and Salesforce Reality

We align early on:

- Founder and CRO revenue objectives
- ICP, buyer roles, and Salesforce-specific buying motions
- How “Salesforce-native” should matter to each buyer persona (economic, technical, admin, SI)
- Current sales and marketing capacity, skills, and tooling

This ensures the sales process we build reflects **how Salesforce deals are actually bought and approved**, and can be executed by your current team—not hypothetical sellers.

Step 2: Sales Process Deconstruction & Salesforce Control Framework

(Core Focus of the Engagement)

This is where the real work happens.

I deconstruct how deals actually move through your pipeline and rebuild the sales process around a framework that enables sellers to **lead buyers using Salesforce-native value as a strategic advantage**, rather than reacting to buyer behavior or feature requests.

Key Areas of Focus

1. Sales Process Integrity

- Deconstruct how opportunities really move from lead to close
- Identify where sellers lose control, credibility, or momentum
- Redefine stage entry and exit criteria based on **buyer progress and Salesforce-specific risk**, not seller activity

This creates a process that reflects real buying behavior inside the Salesforce ecosystem.

2. Teach, Tailor, Take Control — Salesforce-Native Edition

I install a repeatable framework that enables sellers to:

Teach

Reframe the buyer's problem in a **Salesforce-specific context**, showing why native solutions reduce integration risk, accelerate adoption, and align with existing governance.

Tailor

Translate Salesforce-native value to the buyer's role, maturity, and ecosystem dependencies—economic buyers, admins, SIs, and technical stakeholders each care about different outcomes.

Take Control

Lead the deal with clear next steps, mutual action plans, and disciplined qualification—preventing stalled, extended, or “ghosted” deals common in ecosystem-driven sales cycles.

This is where Salesforce-native stops being a footnote and becomes **the reason buyers feel confident moving forward**.

3. Live Deal Inspection

- Review active opportunities for deal quality and risk
- Listen to live sales calls and observe full sales cycles
- Identify where Salesforce-native value is diluted, skipped, or mispositioned
- Surface weak discovery, unclear value articulation, and missed control points

Deals improve when sellers are coached in real time—not after the quarter ends.

4. Pipeline & Forecast Rigor

- Audit pipeline accuracy and stage hygiene
- Separate real Salesforce-driven deals from hope-driven opportunities
- Improve forecast confidence and seller accountability

Using this approach, I've helped Salesforce ISVs improve close rates by **20–100%**, driven by clearer articulation of Salesforce-native value, tighter deal control, and disciplined execution—not by adding more leads.

Step 3: Cross-Functional Revenue Interviews

To ensure sales execution is supported—not undermined—I interview:

- Sales leadership and top sellers
- Marketing leadership (demand, positioning, Salesforce narrative)
- Product leadership (roadmap, differentiation, platform alignment)

This ensures:

- Marketing reinforces Salesforce-native value instead of generic SaaS messaging
 - Product differentiation is expressed in buyer-relevant terms
 - The Salesforce story is consistent across the organization
-

Step 4: Weekly Executive Working Sessions

Throughout the 60 days:

- Weekly working sessions with the Founder or CRO
- Ongoing feedback on deal execution and pipeline health
- Real-time adjustments to process, messaging, and Salesforce positioning

This keeps the engagement **active, practical, and outcome-driven**—not diagnostic theater.

Step 5: Executive Readout & Execution Plan

At the end of the engagement, you receive:

- A clear executive readout of findings
- A Salesforce-specific sales process your team can actually run
- A prioritized execution plan with owners and timelines
- Metrics to measure improvement in close rate, velocity, and deal quality

This becomes your **revenue operating system**, not a static document.

Ongoing Advisory: Sales Execution & Revenue Leadership

Post-diagnostic, I stay engaged as a fractional advisor to:

- Reinforce Salesforce-native sales discipline
- Coach sellers and leaders on deal control
- Inspect pipeline and forecast health
- Adapt execution as the Salesforce ecosystem evolves

This is where gains compound over quarters—not weeks.