

**The Tech**



Playbook

The **Tech**



Playbook

The Tech

**Playbook**



**Empowering Tech  
Growth Through  
Strategic Transformation**

# Salesforce Sets Technology Companies Apart

Technology companies face strong competition which continues to push industry participants to continuously adapt their business models, products, and marketing to address customer demand.

The industry also faces various business challenges including limited visibility across teams, complex planning and budgeting requirements, account management, strained IT resources; as well as security and risk management.

Utilizing the right go-to-market technologies allows technology organizations to develop effective strategies to improve data-driven decision-making, and scale offerings to enhance product delivery and enable across the organization.

**The Tech Playbook is an industry solutions handbook drawing insights from 100,000+ hours of expertise from working with more than 30 organizations in the Technology sector**

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**Key** Tech Trends

Key **Tech** Trends

Key **Trends**

# Key Tech Trends

## Leveraging Cross-Cloud Solutions

The Salesforce products commonly used in the Tech industry center around [Sales Cloud](#), [CPQ](#), [Service Cloud](#), and [Experience Cloud](#). In general, companies look to upgrade their current Salesforce instance or improve their current tech stack with streamlined solutions that allow for growth and the ability to quickly scale.

## Audit and Optimizations

As technology companies experience exponential growth, they quickly discover that their solutions are outdated and limit their ability to quickly scale. Endless webs of configurations and accrued technical debt limit the ability of such organizations to innovate effectively. We have developed a targeted and tailored offering for this very reason and has become a recognizable brand in perfecting Salesforce Audit and Optimization projects.

## Evolving Go-To-Market Applications

Technology companies specifically target Salesforce with the need to upgrade their legacy applications, implement a platform to enable rapid process change, or unite their tech stacks for increased efficiency. No matter the need, technology organizations can rely on Salesforce's market-leading capabilities and endless configuration options to enable their systems for growth.



**Our** Expertise

Our **Expertise**

**in Tech** Our

# Foreword

For over 10 years, we have been at the forefront of innovation in the Salesforce space. We are also one of the leading Salesforce partners for technology organizations who want to stay ahead of the curve and push the boundaries of innovation. We dive into new releases and product offerings and are constantly evaluating all of the capabilities that Salesforce can deliver to our customers. Like us, technology organizations are on the bleeding edge of change. Whether it's incrementally adding value to technology products or creating new ways for us to engage one another, the spirit of technology organizations is to push the boundaries of commerce and challenge the status quo.

While consumers get the benefit of this innovation, it comes at a cost for the go-to-market applications that run technology organizations. Technical debt from enabling systems to manage rapid growth, complex and ever-changing product and pricing scenarios, rapid enablement of new users and departments, scalability of business processes, and ever-changing workflows between teams limit lasting agility. Through this lens, our team has supported, facilitated, and enabled technology companies to rapidly scale their Salesforce environments and centralize their focus on innovation.

GyanSys' project experience partnering with technology organizations is centered on our technology industry experience. While we are Salesforce experts at heart, our technology clients require their partners to understand the complexities and nuances of their business. Our central focus is to provide both industry and product expertise that is cemented in clear points-of-view, optionality for implementation decisions, and ultimately, quick time to market that enables innovation. We are enablers of success and a team that will challenge your thinking to ensure the right solution for your business is developed.

We look forward to hearing from you and supporting you in your Salesforce journey.



**Imran Chatur**

Chief Revenue Officer  
GyanSys Inc.

**“We have supported, facilitated, and enabled technology organizations to rapidly **scale** their Salesforce environments and **centralize** their focus on **innovation**.”**



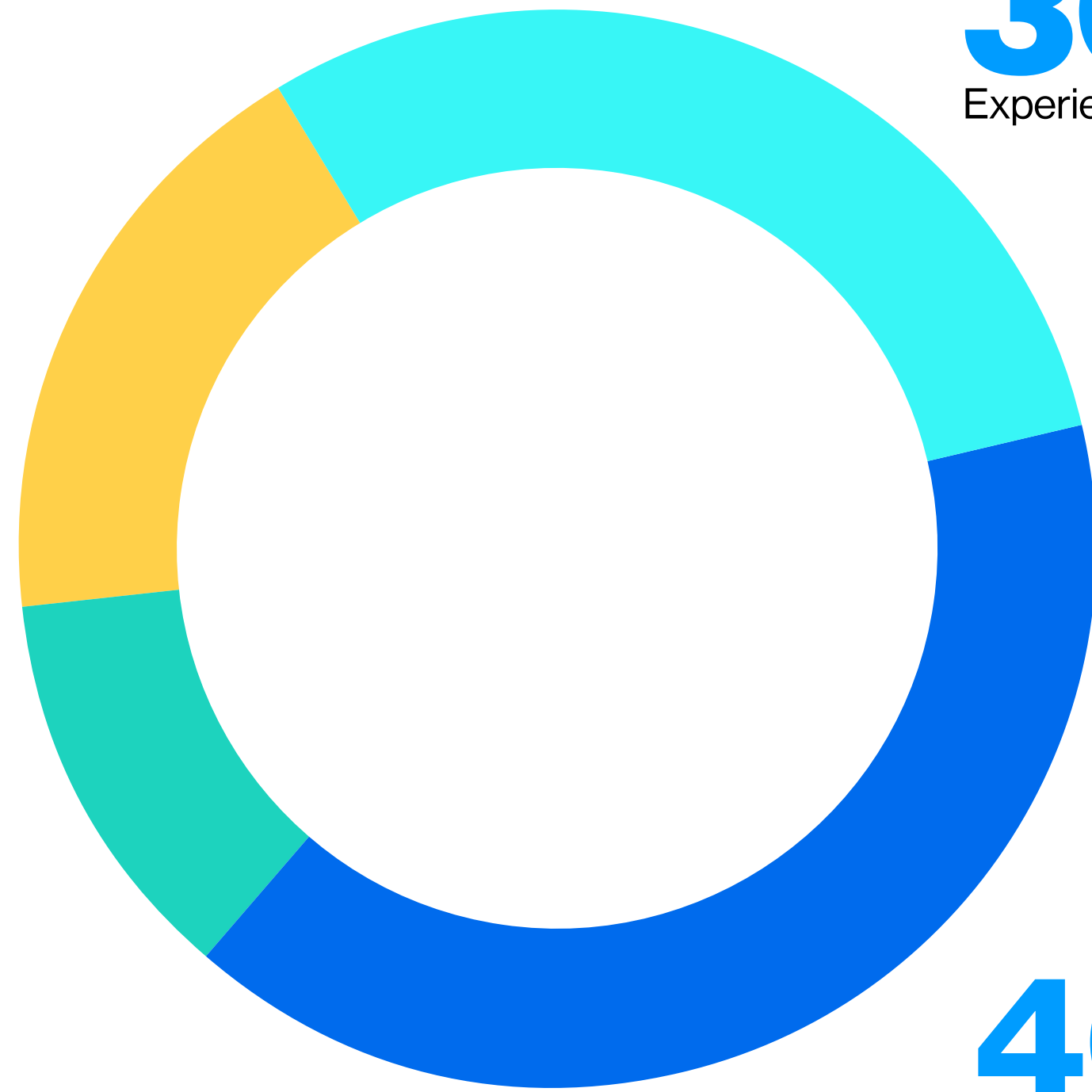
**In 2023, the value of Information Technology services and business services is expected to reach **\$1.17 trillion USD.****



# By The Numbers

## The Salesforce Landscape for Our Tech Clients

**18%**  
Cross-Cloud or  
Custom Solutions



**30%**  
Experience Cloud

**10%** of our High Tech clients have implemented special customization with Experience Cloud

**12%** of our High Tech clients who sell Software and Services get Customer or Partner Community Portals

**12%**  
Service Cloud

**40%**  
Sales Cloud  
and CPQ

**22%** of our High Tech clients who sell Software and Services get Sales Cloud for forecasting, pricing, and account management

# Snapshot of Our Client Use Cases

## Integrations with External Systems

(Snowflake, AWS, Netsuite)



## Digital Adoption and User Onboarding Tools

(WalkMe, Spekit)



## User Management and SSO Integrations

(Okta, Azure)



## Integration with Internal Collaboration Tools

(Slack, Teams, Outlook)



## LMS Integrations

(Drupal, Appinium, LearnTrac, Almond, Lessonly)



## Optimizing Service Organizations to use Omni-Channel Routing



## Integration with External CMS

(Docebo, Sitecore)



## Error Reporting and Handling



**Cross-Cloud**

**SS-Cloud**

**Solutions**

# Sales Cloud and CPQ

CPQ or Configure-Price-Quote refers to the process of configuring products, applying the appropriate price(s), and generating a quote for customer approval. CPQ software is often critical for technology organizations that deal with complex product bundles, a variety of pricing models, and complex approval matrixes. Salesforce offers the best-in-class CPQ tool which has grown both in capability and usage since [Salesforce acquired Steelbrick in 2015](#).

**“The team was instrumental in helping **increase the adoption of Salesforce solutions** across all lines of business. They were crucial in our migration to LEX and the **re-implementation of CPQ.**”**


- Slack




# CPQ Comparison Scorecard

The CPQ comparison scorecard was derived from our 40,000 development and support hours of implementing CPQ solutions for Tech companies. We have developed a robust methodology to analyze complex project needs and use cases to provide a scalable infrastructure. The research completed places Salesforce CPQ as the clear winner by comparing specific platform capability metrics. We are uniquely positioned to deliver effective and reliable CPQ solutions for tech companies.



 Discover how to automate subscription pricing models and manage post-sales activities with Salesforce CPQ

 Read our CPQ White Paper to learn more about how to improve your CPQ journey

ORACLE

salesforce CPQ

APTTUS

• **Functional Capability Description**

Product Configuration	3	3	2
Discounting	2	2	2
Device Support	2	3	2
Quoting	2	3	2
Guided Selling	2	2	3
	11	13	11

• **Scalability and Integration**

Centralized CRM	2	3	2
Integration with 3rd Party Systems	3	3	2
Scalability	3	2	2
	8	8	6

• **Application Customization**

Product Catalog	3	2	2
Sharing & Security	2	2	2
Guided Selling	2	2	2
Quote Merge & Send	2	2	3
Multi Currency/Regional Configurations	2	2	2
Configurations	1	3	2
	12	13	13

• **Strategy, Vendor Support, and Enablement**

Product Roadmap	3	3	2
Professional Services Support	2	3	2
End User and Admin Support	2	3	2
Price	1	2	2
	8	11	8

# Turn CPQ from Chore to Success

Implementing a CPQ tool is one of the first steps to establishing a strong and scalable Quote-to-Cash (QTC) infrastructure. We have extensive experience with Salesforce CPQ and continue to help Tech companies to configure and support a variety of product and service go-to-market strategies that enable sales teams to create tailored deals. Implementing CPQ tools provides Tech companies the ability to enhance their subscription and sales processes to reimagine the services they provide and scale their business.

**The CPQ software market is expected to grow to **\$1.8 billion** by 2024, at a compound annual growth rate (CAGR) of **9.5%**.**

This growth suggests that more organizations are adopting CPQ tools to help them streamline their sales processes and improve their ability to sell complex products and services.

- Markets and Markets

# Service Cloud

As many Tech companies consider Service Cloud, there are important aspects to be aware of before embarking on transformation initiatives. We understand the core customer service user needs and challenges; as well as, optimizing specific business capabilities such as case management, knowledge management, omnichannel routing, self-service, and unified agent experiences. These commonly used Service Cloud functionalities improve users' day-to-day operations and help Tech companies to scale their current Salesforce instance.

Service Cloud implementations ensure case management and deflection workflows are streamlined from initial contact with customers to resolving and closing cases with basic classifications, such as Warm Request, Reassign, Reject Cancel, Cold Request, and Cancel. Tech companies get additional functionalities that handle larger case volumes, including automated handovers, email notifications and send-outs, and auto case routing. These enhanced features can be easily implemented to manage the lifecycle of any service request process across all types of business models.

The Unified Agent Experience allows support teams, including Technical Engineers and Managers, to easily communicate the right information by efficiently validating the customer, capturing relevant

the customer, capturing relevant case details, and triaging requests to be assigned cases to the right team; all resolved within one screen. Case escalations are simplified with the request going to the right manager to approve and remove delays to support customers.

Service Cloud features allow admins to easily modify components, add new tabs, and organize the layout in line with changing needs. Plus, they can take advantage of AI-powered system recommendations, and hard-coded steps workflows that use the power of Flows that guide users through a well-defined process.

## 3 main features of Service Cloud that you can take advantage of are:



A 360-degree view of accounts allowing reps to quickly find the necessary background



Access to custom reports and dashboards with functionalities including submitting cases updating cases, uploading documents to cases, as well as access to knowledge documents



Live Chats are used as an alternative support channel that incorporates agent skill assessment and the number of agents that need to be available for live chat

# Deep Dive: Service Cloud for Splunk

Case Number	Priority	Business Severity	Subject	Status	Date Modified	Owner
12500332	High	High	Reason for case has been stated previously...	In Progress	03-04-2021	Sarah Calzoni

## Our Team in Action



Service Cloud helps Tech companies to scale and humanize brand interactions within their service processes through automated workflows. By providing AI-powered chatbots and contact center efficiencies to teams, agents can solve cases faster and lower case volumes. We are experts at connecting Service Cloud across the full customer lifecycle and building solutions that provide user-friendly tools for addressing customer concerns quickly.



Learn more about Splunk's scalable solution that offers automation, flexibility, and integration to track their support efforts



# Experience Cloud

Experience Cloud enables organizations to connect customers, partners, suppliers, and employees with one another. Our expertise lies in developing mobile-friendly, secure, and highly configurable applications that can be developed to support a number of use cases.

A common use case for Experience Cloud is to help build user groups and grow communities through a branded, personalized and moderated experience. The capabilities we developed for Slack allow admins to maintain a scalable portal for all user groups that are discoverable through SEO with authenticated and unauthenticated experiences. Additional features developed help admins to automatically link searched topics to related content that is powered by AI to provide the best options to provide a richer experience.

Gamification is another great way to increase engagement within user portals. Admins can offer recognition to their teams and top users by awarding badges to the most helpful and engaged portal users.

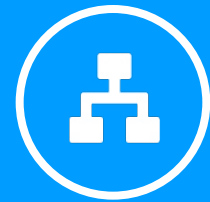
GyanSys has broad expertise in Experience Cloud, sits on Salesforce's partner advisory board, and actively supports Salesforce in product development for Experience Cloud.

**Our team** has broad expertise in **Experience Cloud**, sits on **Salesforce's partner advisory board**, and actively **supports Salesforce in product development for Experience Cloud**

## 5 Key Ways Experience Cloud Builds User Groups



Scalable online communities with a distinct brand identity



Upscaling customer journeys to find answers faster



Enhanced understanding of patterns of adoption



Surfacing data on community health and engagement



Gamify experiences and boost engagement

## Our Team in Action



The reality today is that there are many mature and enhanced platforms to interact with customer communities online. Every user group and community has different needs and unique interests that need to be addressed. To be the best, you have to discover what other great brands are creating and developing.



[Read the complete Slack Success Story](#)



[Learn more about Slack's experience with GyanSys and Experience Cloud](#)

## Top 3 Ways to Achieve End-user Adoption and Continued Engagement



Security in place around moderation for system admins and community moderators



Deploying out-of-the-box features for collaboration and recognition



Implementing AI-powered dashboards and reports to track which groups and topics are most or least engaged with


# Partner Relationship Management (PRM)

Our PRM expertise allows Tech companies to offer unique partner experiences, enabling them to distribute marketing and sales initiatives fluidly between partners and to support co-selling initiatives by bringing all resources together to close business more effectively.

A key strategy to overcome bringing partners together from different locations is to provide a unified interface designed to answer partners' product questions and inform them about rules of engagement, policies, and guidelines. Comprehensive training programs are also important so that all users understand and master all featured products inside and out.

PRM solutions should provide clarity on opportunities and streamline lead management processes to decrease record duplication. This means that every phase of the lead lifecycle needs to be visible, which should lessen any chance of channel conflict.


Partners need to be able to connect and engage with customers, which means they need the right tools to perform tasks in the field. Whether it's accepting leads or deals in real-time, having access to marketing content, or providing quick updates on leads, organizations are supplementing their Experience Cloud instances with PRM features to best serve their end users, allowing them to develop their channel sales initiatives.

 [Read the PRM White Paper on streamlining and sustaining partner relations](#)

# Deep Dive: PRM for Samsara and FICO




For clients like Samsara, the partner onboarding workflow was crucial to the success of their new partner portal project. While scoping their project, we identified several high-priority enhancements that needed to be addressed: implementing quote templates, product and price rules, and identifying quick actions.

 [Read the complete Samsara Success Story](#)



Our partnership with FICO enabled them to offer login access through SSO with Okta, without the need for their partners to create another account. The system developed enables a robust lead management workflow: a rich activity timeline lets you access leads' most up-to-date contact information, and see from which marketing campaign the lead came. The custom deal registration process was also developed with pre-defined criteria, such as specific status options - new, submitted, approved, and declined.

 [Read the complete FICO Success Story](#)

## 8 Ways PRM Solutions Empower Technology Companies



User Invite Process with Approval Process for managing access



Ability to submit deals and collaborate on opportunities



Centralized location for partner information



Integrations with CMS for content and material access



Tailored onboarding path



Partner Locator Listing



User Management and Identity Provider Integration to register and enable user access



Integrate with an LMS system for managing training paths, tracking progress and certifications



**Evolving** GTM

ing **GTM** App

**Applications**

# ARR: Enhance Business Visibility and Planning

ARR is the acronym for Annual Recurring Revenue, which is a key metric used by Tech businesses that have term subscription agreements with a defined contract length of at least one year. For most companies, there is not one standard way to calculate this vital information, which means out-of-the-box solutions cannot easily help solve these challenges.

## What Matters Most About Calculating ARR

Our experience with tech organizations allows us to work closely with our clients to clearly define common subscription-based scenarios such as renewals, upsells, and amendments to standardize and recognize revenue. This enables our clients to confidently recognize the right subscription trends and work towards growing current and new subscriptions while reducing churn.

Through the design phase, our team will identify and define various business scenarios through workshops with the goal of standardizing definitions and processes across different business teams. Once the design is completed and signed off, implementation can begin in which specific formulae and automation will be developed to calculate the appropriate metrics and mapped to the right fields in the system. The solution developed will also consider how legacy data and inflight data for records that are still being worked on will be reconciled with the future state solution.

Functional testing is of utmost importance, especially when dealing with business critical metrics such as ARR to ensure that every single scenario and edge case has been solved. Artifacts from the design phase will be leveraged again to facilitate the testing phase to ensure that no loops have been left unresolved and that all scenarios and teams are aligned with the expected results.

Our experience and knowledge of the Technology sales process and the nuances between the different scenarios allow teams to have a unified view of the data, reduce the need for manual reconciliations, and remove confusion around what the data in the fields represent. Standardizing business metrics supports growth at scale, ensures compliance with regulatory requirements such as ASC 606, and supports reporting integrity and automation.

## Our Team in Action



All business teams should be able to access up-to-date and real-time data about key metrics such as ARR. The best companies are enhancing their Sales Cloud instances with the right features to calculate and recognize revenue enabling users to have high confidence in the data that is being presented to them.



[Read the complete Udemy Success Story](#)

# Deep Dive: Our ARR Solution for Udemy

## Project Approach



### Discovery

Iterative and in-depth conversations are held with all Stakeholders, such as:

- Sales
- Commissions
- Finance
- CS
- Deal Desk

Detailed data and deal scenarios are captured:

- Ramp Renewals
- Clawbacks
- Churn
- Bundles



### Solution Design

Scalable - to accommodate dynamic subscription models, organizational growth, and evolving products

To meet industry standards and best practices, i.e.,

- Revenue Recognition
- Bookings
- Public Reporting

Translatable across integrations and externalities

- GTM Tools (Fullcast)
- CS Platforms (Gainsight)
- Accounting (Netsuite)



### Implementation and testing

Each scenario undergoes rigorous testing (Unit, SIT, UAT, Regression), to confirm:

- Results match expected values and standards
- User functionality is intuitive
- Edge cases are accounted for
- Probably future state cases are supported

The reconciliation of historical and in-flight data is tested using data uploads and batch jobs, ensuring historical data liabilities are met through SFDC or external systems (Snowflake)



### Deployment and CM

- The deployment is designed to have minimal impact on financial cycles
- Maintain documented and proven data rollback plans
- Pre and post deployment strategies consider integrations, apex, triggers and price rules
- Change Management runs in parallel throughout the project journey, and includes:
  - Facilitating comms
  - Change Champion Network
  - Enablement courses, videos and documentation



# Deep Dive: Our ARR Solution for Udemy

## Key Personas

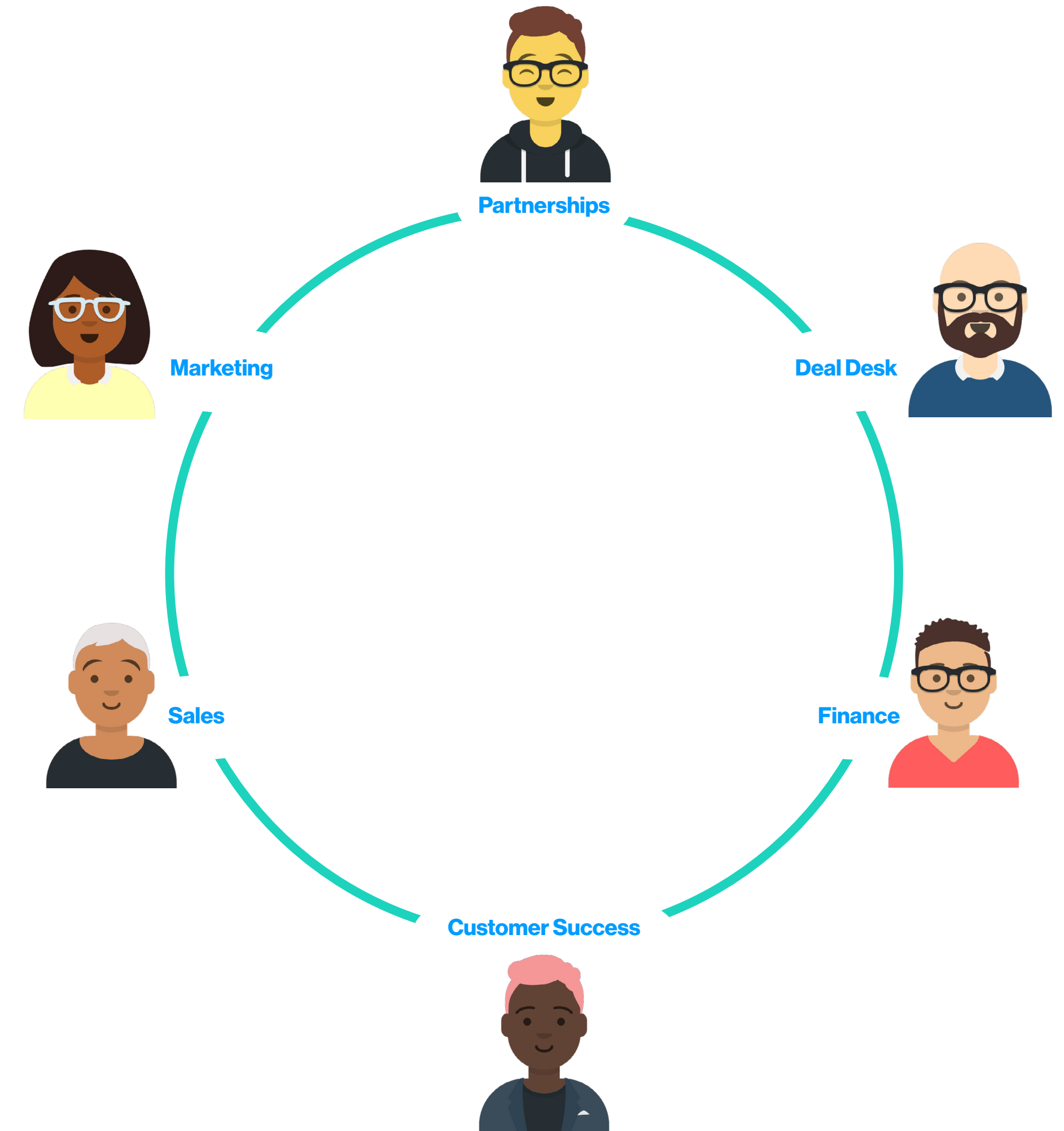
All impacted stakeholder groups collaboratively engage with the project team to help inform and design a solution that meets their needs, now and into the future

### Discovery sessions uncover key insights

- How metrics are defined and leveraged
- Defining relevant scenarios, including different personas, deal types, metrics and standards
- The gap between industry standard best practices and the current state, and the resulting pain points
- Future state needs, including scalability and historical data considerations

### A sustainable solution is designed

- Accurately calculates metrics that meet the needs of all internal and external stakeholders
- Is translatable across different historical, current and future state scenarios
- Is scalable and intuitively designed for Salesforce and other integrated systems



# Forecasting: Improve Risk Management

When it comes to forecasting, most Tech companies want to better understand patterns of adoption and benchmark across their customer base. Typically the goal is to increase the total number of billable accounts by getting real-time visibility into each account's consumption behavior.

Our team developed a Forecasting App that provides a specific schedule/cadence to ensure all other required forecasts have been submitted, as well as custom reports and dashboards are available so that management can have an at-a-glance view of the data before entering their forecasts. This allows teams to be proactive in managing their accounts if there is a projected downturn. A truly accurate forecast displays detailed trends and points out the gaps between current and expected demands to ensure teams will hit their targets.

Organizations can improve their sales cycles by involving their customer support team to input important customer feedback and information to achieve continued success. Our team created workflows focused on monetization reengineering, including growing the relationships already built by the customer success team and helping provide better visibility into each account's user consumption behavior. Once both teams have provided their data, the Salesforce Forecasting App will automatically calculate the

right forecast data for the new month to give management enough time to make necessary adjustments and remain on track to meet company goals.

The screenshot shows the 'CS Consumption Planner' interface. At the top, there are search and filter options: 'Search by hitting "Enter" key' with a search box for 'Account Name', 'Sort By Column...' with a dropdown for 'Total AOV', and 'Sort By Order...' with a dropdown for 'Descending'. A 'Select CSM' button is on the right. Below this is a table with columns for 'Customer Segment & Industry' and 'Customer Landscape'. The table lists 10 accounts (Account1 to Account10) with fields for CSM Name Text, Consumption Plan Type (e.g., Internal Plan), Company Segmentation (e.g., ESB), Sales BizOps Industry, Customer Journey Stage, Willingness to exceed GFE? (Yes/No toggle), Internal Resources Assigned, Red Account?, Growth Type, and Renewal Date.

The screenshot shows the 'Forecasting' interface. At the top, there are 'Save Data' and refresh buttons, and 'Fiscal Quarter' and 'Fiscal Year' dropdowns. The main table has columns: 'CSM: Full Name', 'Sum of IBAU Forecast', 'Sum of Current IBAU QTD', 'Sum of Gap to Growth', '% to Forecast', 'Gap to GFE', 'Sum of Mgr CMT', 'Sum of Mgr ML', and 'Sum of Mgr BC'. Below this is a table for 'Today's Forecasting Week: 15 Aug 2020' with columns for 'Week of', 'Sum of CSM IBAU', 'CMT', 'ML', and 'BC'.

CSM: Full Name	Sum of IBAU Forecast	Sum of Current IBAU QTD	Sum of Gap to Growth	% to Forecast	Gap to GFE	Sum of Mgr CMT	Sum of Mgr ML	Sum of Mgr BC
Name 1	-26,120	-6,505	0	0	25%	28,266	-27,070	-27,070
Name 2	-54,995	0	0	0	0%	38,427	0	0
Name 3	-17,962	0	0	0	0%	17,424	-17,962	-17,962
Name 4	-48,949	0	0	0	0%	47,745	0	0
Name 5	-21,974	0	0	0	0%	23,497	-21,974	-21,974
Name 6	-77,665	0	0	0	0%	49,210	0	0
Name 7	-338,079	-1,905	3,200	1%	348,784	-84,000	-84,000	-84,000
Name 8	-65,508	0	0	0	0%	62,890	-65,508	-65,508
Name 9	-34,094	0	0	0	0%	38,876	0	0
Name 10	-193,488	0	0	0	0%	187,960	0	0
Name 11	-37,212	0	0	0	0%	49,342	0	0
<b>Grand Total</b>	<b>-916,046</b>	<b>-8,410</b>	<b>3,200</b>	<b>1%</b>	<b>892,421</b>	<b>-216,514</b>	<b>-216,514</b>	<b>-216,514</b>

Today's Forecasting Week: 15 Aug 2020				
Week of	Sum of CSM IBAU	CMT	ML	BC
6/29/2020	-917,096	105	105	-
8/15/2020	-916,046	1,000	1,000	1,000

## Data Accuracy in Real-time with the Forecasting App

CFOs and managers no longer need to worry about data accuracy with the Forecasting App. Instead of using Google Sheets with manual work to transfer and present data, companies can streamline workflows with a consolidated view of all the business accounts and team activities. The system displays historical actuals that are calculated based on month-to-month or previous-year user consumption to accurately display reliable targets and align company resources the correct way.

User profiles allow for proper governance and can be set up in different levels of access with main permissions given to admins and all authorizations are given to leader accounts. These role-based permissions provide increased security with specific profiles to do predefined actions and limit access to sensitive information.

Whether it's increasing forecasting efficiencies or managing changes in forecast values, the best companies are supplementing their Sales Cloud instances with products to best serve their team and end users and allow them to do business more efficiently.

**“We would absolutely recommend them as a partner. The team was amazing and hands-on from day one. We’ve already seen major positive impacts.”**

- Slack

## Our Team in Action



To be prepared for rapid growth many Tech companies need to ensure that their forecasting workflows are streamlined. The final goal is to provide better service and remove waste by optimizing how sales strategies are planned and adequately budgeting for each quarter.

To ensure this, our Forecasting App helps to overcome challenges around short or non-existent sales histories, inaccurate data, seasonal influences, and even terminological inconsistency between management, finance, sales, and customer support teams.



[Read the complete Slack Success Story](#)

# Solution Based Selling

Many Tech companies have niche and custom solutions tailored to specific customer demands. Over a period of time, the same organizations grow and continue to innovate their current features for customers, and so do their product offerings. This can result in a proliferation of SKUs in the system and a patchwork of quotes that are pieced together based on customers' needs. While this approach does offer flexibility, it can often be confusing for customers and salespeople alike. Additionally, in the buyer's mind, this approach also tends to focus more attention on features and pricing instead of the perceived value and fit.

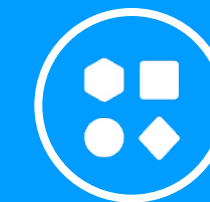
Adoption of Solution Based Selling is growing quickly, especially with companies already invested in selling more than one or two products. A best practice for Tech companies like Chainalysis, that get to a point of large enough growth, is to realign their go-to-market strategy and standardize their product offering to provide wider benefits to customers.

Our team has experience in designing and implementing Salesforce to support these initiatives. Through the configuration of core CPQ capabilities such as guided selling, bundling, filters and updates to the quoting interface organizations can greatly simplify their quoting process.

## 5 Benefits of Solution-Based Selling with Salesforce



Standardize and simplify the product offering to customers



Supports a mix of packaged and ad-hoc products



Guide users and customers through the buying process



Refocus attention on value, not features



Allow for flexibility as product offerings evolve

**Audit** and **Opt**

**dit** and **Optim**

**Optimization**

# Audit Discovery Package

More and more Tech companies are presented with the great dilemma - to reimplement Salesforce within a new instance or to optimize and fix outdated Salesforce instances with heavy customization before experiencing performance degradation. Our business and technical audit package provides executives with the insight they need to make an informed decision.

For clients like Samsara, this meant delivering a detailed overview of risks their Salesforce instance will face as they scale and a high-level risk assessment. This analysis will include areas such as Structural, Workflow, and Security Optimization. This assessment methodology is mainly a comprehensive technical audit to uncover instances where reducing unused Salesforce data/metadata and eliminating unnecessary cross-references of processes is needed to address maintenance issues and slow load times.

To improve overall adoption and efficiency, we work closely with client teams to correct and update reports, dashboards, and folders to meet user needs and increase platform usefulness. The end goal is to remove any technical debt and replace outdated items with more current Lightning solutions.

## Audit Discovery Package

Our tried and tested methodology delivers fast and flexible solutions that guide our partners every step of the way to empower and upskill teams for continued success. [Learn more.](#)

## Service Offerings: Org Merges

Do you work on several Salesforce Orgs with shared data and processes? Do you struggle with disjointed workflows? Need to streamline your legacy systems and business processes?

Our well-engineered approach helps to identify which Orgs to keep and provide a single view with a modernized and consolidated Salesforce instance.

[Learn more.](#)

## 8 important steps that we deploy to help maximize tech stacks:



Build out detailed business architectures



Document areas of opportunity



Design capability and technology maps



Gain insights into current utilizations



Identify risks



Present realistic timeline



Get a holistic view of current Salesforce ecosystem



Discern priorities for current and future implementations

**Let's** Work Together

er **Let's** Work

**Together** Let

# Why Work With Us?

We are one of Salesforce's top partners for the Technology sub-vertical and have strong relationships within this industry. Our collaboration with Salesforce's own product teams allows us to ensure we shape implementations to follow best practices and align with Salesforce's future goals and aspirations. If you're looking for a partner that can help you stay ahead of the competition and push the boundaries of innovation, and support you on your Salesforce journey look no further than us.

**Tech companies have chosen to implement Salesforce and partner with us to drive transformation.**



samsara



OneTrust





**Implementations completed over the last 4+ years are currently powering, enabling, and reaching millions of Tech networks, partners, and customers around the world.**

# About Us

GyanSys is a leading global mid-tier provider of digital transformation solutions and systems integration supporting global enterprise customers. We specialize in solutions implementations, managed services, and data analytics spanning SAP, Salesforce, Microsoft, and other prime enterprise platforms. Using a mature blended delivery model with over 2,000 consultants, we support over 350 enterprise customers across the Americas, Europe, and APAC.



Software & Services



Sales Cloud



Experience Cloud



Service Cloud

**Contact us** today to discuss a customized solution for enhancing business visibility, sales forecasting, and customer engagement processes.

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