### To ensure a prosperous business, a unified platform is essential—one that consolidates all your data, manages business processes and workflows, and facilitates interactions with customers and partners through multiple channels, all within a single interface. Seamless harmony among these elements paves the way for success and scalability. If a business is not integrated with the online world and doesn't leverage cutting-edge technology, it risks becoming invisible in today's digital landscape.

### In the age of the Fourth Industrial Revolution, Salesforce aids businesses in digital transformation. This entails digitizing processes, creating seamless customer experiences, leveraging data for decision-making, and driving innovation. With Salesforce, companies can be more agile, customer-centric, and efficient.

### Remember, Salesforce is not just a set of individual clouds but an integrated platform where all these elements can work together to provide a 360-degree view of your customers and operations. By harnessing the power of Salesforce, businesses can break down silos, understand their customers better, engage them on their preferred channels, and ultimately drive growth.

### What is Salesforce? [www.salesforce.com](http://www.salesforce.com/)

# Salesforce is the customer company. We make cloud-based software designed to help businesses connect to their customers in a whole new way, so they can find more prospects, close more deals, and wow customers with amazing service.

# Customer 360, a complete suite of products, unites your sales, service, marketing, commerce, and IT teams with a single, shared view of customer information, so that your company can become a customer company, too.

### Sales Cloud <https://www.salesforce.com/products/sales/>

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### Service Cloud <https://www.salesforce.com/products/service/>

Service Cloud is a customer service and support platform. It empowers your service agents with a comprehensive, unified view of every customer interaction across your business. With Service Cloud, you can automate service processes, streamline workflows, and surface key articles, topics, and experts to transform the agent experience. Its omnichannel support allows businesses to meet customers where they are, whether that’s on social media, email, phone, or even chatbots, providing personalized and faster service. The platform's predictive analytics can also help route queries to the most qualified agent, improving efficiency and customer satisfaction.

### Marketing Cloud <https://www.salesforce.com/products/marketing-cloud/overview/>

Marketing Cloud is a customer engagement platform. It helps businesses deliver personalized customer journeys across various channels, whether email, web, mobile, social media, or digital advertising. By using artificial intelligence, the platform can segment and target audiences more accurately, schedule the best time to send communications, and even predict optimal content. This means more effective marketing campaigns and a better return on your marketing spend. With Marketing Cloud, you can track and measure the effectiveness of your campaigns in real-time, adjusting strategies as necessary for maximum impact.

Experience Cloud <https://www.salesforce.com/products/experience-cloud/overview/>

Marketing Cloud is a customer engagement platform. It helps businesses deliver personalized customer journeys across various channels, whether email, web, mobile, social media, or digital advertising. By using artificial intelligence, the platform can segment and target audiences more accurately, schedule the best time to send communications, and even predict optimal content. This means more effective marketing campaigns and a better return on your marketing spend. With Marketing Cloud, you can track and measure the effectiveness of your campaigns in real-time, adjusting strategies as necessary for maximum impact.

Data and Analytics <https://www.salesforce.com/products/genie/overview/>

Salesforce's data and analytics capabilities, embodied in Tableau CRM (formerly Einstein Analytics) and the larger Tableau platform, empower businesses to make informed, data-driven decisions. They can visualize, understand, and drive actions based on data like never before. These tools provide intelligent and predictive insights, automate actions based on these insights, and create a culture of data across the organization.

**Technology expertise**

Ever dreamt of a team of seasoned pros who can build your custom solutions? That's us. With our decades of experience in software development and solving real business challenges, we can craft Enterprise Applications, Web, Desktop, Mobile applications, Micro-services, Cloud Applications, and Cybersecurity solutions. Got databases? We can handle them easier than saying the word 'database.'

Share your challenges, and we'll transform them into opportunities. We promise you'll be so impressed with our efficient delivery of top-tier products that you'll want us as your lifetime partners. We're just a group of simple guys who realized we could build better, faster, more scalable products and systems for less, doing it two times faster than the competition.

**Salesforce expertise**

Imagine having a guide by your side as you explore the vast universe of Salesforce's standard out-of-the-box solutions—that's us. We're here to help you identify and solve your business problems, whether it's boosting sales, enhancing customer service, easing your workload, automating tasks for cost-saving, integrating systems, or marketing your business.

Once you select the perfect Success Plan, we'll set it up, customize it, and integrate it with any other system you need. We ensure you only get the essential tools from Salesforce, saving you costs—not because it leaves more for our fees, but because as your partners, we genuinely care.

With our extensive experience in Salesforce and building enterprise and SMB software systems, we guarantee efficient, streamlined, scalable, and robust solutions—crafted by human expertise, boosted by AI. As for the implementation costs, we aim to offer competitive rates that'll make you smile.

As for customization, think of us as your Salesforce tailors. We'll stitch, sew, and tweak until your solution fits like a glove. Need a Salesforce top hat with a pink feather? We got you!

To end on a high note, we share a quote from one of our clients: 'The only regret we have, is not having known you earlier.' On that note, we're off to continue working on our 'Time Machine.' Wish us luck!

**What we can offer**

**Enterprise Applications:**

We can create robust, scalable, and secure enterprise applications. This includes CRM systems, supply chain management systems, and other business applications that help automate internal processes, increase efficiency, and reduce costs. These applications can be built to integrate seamlessly with other tools and systems the business is already using.

**Web Applications:**

We can leverage the powers of .NET, which is excellent for building dynamic, feature-rich web applications, from complex e-commerce platforms to blogs, social networks, or custom CMS (Content Management Systems). ASP.NET, part of the .NET framework, is specifically designed for this purpose and allows for rapid development and deployment.

**Microservices:**

Providing solutions to develop microservices - an architectural style that structures an application as a collection of loosely coupled services. This can make it easier to develop, test, and scale large, complex applications.

**Mobile Applications:**

Development of cross-platform mobile applications, one codebase deployed on multiple platforms, like Android and iOS. This can greatly reduce development time and costs.

**Desktop Applications:**

Building Windows desktop applications with rich user interfaces. This could include everything from simple utility apps to complex graphics and gaming software.

**AI and Machine Learning:**

Building custom AI and machine learning solutions. These could be used for everything from predictive analytics to natural language processing, recommendation systems, and more.

**Cloud Development:**

Creating highly scalable and reliable cloud applications and services, building, deploying through AWS and Microsoft-managed data centers.

**Website**

**1. Home Page:**

Top: Company logo on the left, navigation menu on the right (Home, Services, About Us, Blog, Contact Us)

Main section: Rotating banner with key marketing messages and high-quality images. Underneath, you could have brief sections or clickable cards for "Our Services," "Our Work," "Book a Consultation," etc.

Middle: A section highlighting your team's expertise, customer testimonials or notable clients, and an invitation to explore your services further or read your blog for more information.

Bottom: Footer with quick links (terms and conditions, privacy policy), social media icons, and contact information.

**2. Services Page:**

Top: Company logo and navigation menu.

Main section: Detailed descriptions of each of your services, ideally divided into sections or using tabs for each major service area (Salesforce Solutions, .NET Solutions, etc.).

Middle: Case studies or examples of your past work (if available), testimonials from satisfied clients.

Bottom: Call to action (such as "Book a Consultation" button) and footer.

**3. About Us Page:**

Top: Company logo and navigation menu.

Main section: An engaging company overview and mission statement, followed by profiles or bios of key team members.

Middle: An infographic or timeline of your company's growth, key milestones, etc.

Bottom: A call to action (e.g., inviting visitors to connect with you on social media), followed by the footer.

**4. Blog Page:**

Top: Company logo and navigation menu.

Main section: A feed of your latest blog posts. Consider sorting by categories or adding a search function to help visitors find relevant content.

Sidebar (optional): Most popular posts, recent posts, blog categories.

Bottom: Call to action (such as subscribing to your blog), followed by the footer.

**5. Contact Us Page:**

Top: Company logo and navigation menu.

Main section: Contact form for visitors to send inquiries, plus your email address, phone number, and physical address (if relevant). You could also include a map widget if you have a physical location.

Bottom: Footer.

Remember, a clean, intuitive layout is key to keeping your visitors engaged and helping them find the information they need. A professional designer will be able to bring these ideas to life and create a visual layout that aligns with your brand's style and color scheme.

**Starting Consultancy:**

Starting a Salesforce consulting business involves multiple steps, from understanding the Salesforce ecosystem and gaining relevant certifications, to building a strong team and establishing clear operational processes. Let's break down each segment:

**1. Go To Market Strategy**

Target Audience: Identify the industries, business sizes, and departments you want to target. For instance, you might focus on SMBs in the health sector or large enterprises' marketing departments.

Value Proposition: Clearly articulate why clients should choose your consultancy over others. This could be niche expertise, faster delivery, unique methodologies, etc.

Pricing Strategy: Decide whether you'll charge hourly, per project, or have fixed prices for certain packages.

**2. Salesforce Alliances**

Become a Salesforce Partner: This gives you access to resources, training, and potential leads. Salesforce has different partnership tiers, from Registered to Global Strategic.

Network at Salesforce Events: Dreamforce, local Salesforce community events, and webinars are opportunities to network and build relationships.

**3. Services**

Implementation: Help clients set up Salesforce from scratch.

Customization: Tailor Salesforce to a business's unique needs.

Integration: Ensure Salesforce works seamlessly with other systems.

Training: Educate teams on using Salesforce effectively.

Ongoing Support: Offer post-implementation support to resolve any issues.

**4. Pre-Sales**

Discovery: Meet potential clients to understand their needs and whether Salesforce is the right solution.

Proposals: Create detailed proposals outlining the project's scope, cost, and timeline.

**5. Sales**

Lead Generation: Use content marketing, paid advertising, partnerships, and more to attract potential clients.

Sales Process: Have a clear sales process from initial contact to closing the deal. This includes qualifying leads, holding discovery meetings, and presenting proposals.

**6. Marketing**

Content Marketing: Write blog posts, ebooks, and case studies showcasing your expertise.

Social Media: Engage with the community on platforms like LinkedIn, Twitter, and the Salesforce Trailblazer Community.

Webinars and Workshops: Offer free or paid sessions on Salesforce best practices.

**7. Operations**

Project Management: Ensure all client projects are on track. Use tools like Trello or Asana.

Quality Assurance: Regularly test and review work to ensure it meets high standards.

Feedback Loop: After completing projects, gather feedback to continuously improve.

**8. Culture**

Training and Development: Invest in your team's ongoing education. Encourage Salesforce certifications.

Team Building: Hold regular team meetings and activities to foster camaraderie.

Values and Mission: Clearly define your company's purpose and the values you stand for.

**9. Consultancy Templates**

Proposal Templates: For pitching to potential clients.

Contract Templates: For finalizing terms and conditions.

Project Management Templates: For tracking project milestones and deliverables.

Feedback Forms: For gathering client feedback post-project.

Case Study Templates: For showcasing successful projects on your website and marketing materials.

Remember, in the consulting world, your reputation is everything. Prioritize delivering value and building trust with your clients, and the business will grow from there. It's also crucial to stay updated with Salesforce's regular updates and new features, ensuring your consultancy remains at the forefront of the ecosystem.

**STEPS**

Starting a consultancy, especially while working full-time, can indeed feel overwhelming. The key is to break it down into smaller, actionable steps and set a realistic timeframe. Here is a prioritized list with some advice for each step:

**Step 1: Register a Company Officially**

Advice: Before anything else, establish a legal entity. This will separate your personal and business finances and make you appear more professional to potential clients. Consult with an accountant or a lawyer to determine the best type of business entity for your consultancy (LLC, S Corp, etc.) and to understand the tax implications.

**Step 2: Build a Website**

Advice: Since you have the domain "thedigitalronin.com" and a structure in mind, start developing the website. It doesn’t have to be perfect initially; a clean, professional-looking site with clear information about your services, your qualifications, and a way to contact you is a good start. As your business grows, you can refine and expand the site.

**Step 3: Create Content**

Advice: Start creating educational content around Salesforce. This could be blog posts, whitepapers, or webinars. Aim to solve common problems your target customers might have. This will establish you as a thought leader in your space, even if you haven't delivered a project yet. Post the content on your website and share it through LinkedIn and other social media channels.

**Step 4: Get Salesforce Partnership**

Advice: Becoming a Salesforce Partner can give you additional credibility and access to resources. As for SalesforceBen's courses, if you think these will significantly increase your skills and knowledge, then they might be a good investment. However, they aren't mandatory for partnership. Weigh the cost against the potential benefits.

**Step 5: Secure Your First Project**

Advice: Breaking the experience loop is often the hardest step. Consider offering your services at a discount, or even pro bono, for the first project or two. Look within your network—past colleagues, friends, etc. who might benefit from Salesforce consultancy. These initial projects, even if unpaid, will give you the experience and testimonials you need to start securing paid projects.

**Additional Tips:**

Networking is Key: Attend Salesforce or industry events, engage in online communities, and connect with other professionals. Networking can lead to referrals and opportunities.

Manage Your Time Wisely: Since you are working full-time, set specific, dedicated hours per week to work on your consultancy. It might mean working on weekends or evenings, but consistent time investment is necessary.

Set Clear Boundaries: Ensure you are not breaching any contract with your full-time employer when starting your consultancy. Keep your consultancy work separate from your full-time job.

Consult a Mentor or Advisor: If possible, find someone who has been through this process before. Their advice and guidance can be invaluable.

Remember, building a consultancy is a marathon, not a sprint. Progress will likely be slow at first, but consistent, quality work will lead to growth over time. It’s important to be patient and persistent.

**Salesforce Consultancy Q & A:**

1. What’s the procedure when working/hiring/partnering with offshore Technical team?

2. How many people should be onboard? Positions?

3. What Salesforce Certificates do I need to become a Consultant?

4. Prior to opening a Company, can my personal working experience qualify as an Experience if I worked for a company as a full time employee?

5. I will focus on Sales Cloud and Service Cloud features with strong emphasis in Service cloud. I have a great experience implementing:

 - SMS,

- Chat with Einstein Chatbot including building a custom OmniBot framework, Bot handling multiple interaction channels work items as well as complex logic based on Salesforce and External Systems Data, and deploying the Bot/Virtual Assistant to multiple Web Apps/Websites,  - Email-to-Case customizations,

- Amazon Connect & Service Cloud Voice for voice calls,

 - Omni-Channel configurations, routing and Work items assignment to the right Agents

- Case resolution , Case deflection,

 - “NBA - Next Best Action”

 - Knowledge Articles,

 - Database standartization, formatting and DeDuplication,

 - Integrations with external systems to get data and expose data (Data Driven Development and Logic),

 - I am excellent with OOP concepts, SOLID Principles and have written many APEX classes, efficiently used SOQL and careful with DML operations (this is especially very important in Salesforce Multi-tenant environment).

- IDP: SSO, OAuth2.0.  - Great experience with UI Frameworks (LWC, AURA, VisualForce pages) - Experience Cloud: Access based on licenses

- Guest vs Plus Community Portal Users. Registration, Verification, MFA setup, both Partner and Customer Portal UI customization.

- Good understanding of Salesforce record sharing and security model.

- Built many custom Applications and customized Standart Application using Object settings (Page Layouts, Record Types, Lightning App Builder, dynamic forms, etc.,)

5.1. What skills are more preferred? (It’s two-sided coin, Companies want everything cheaper, but Salesforce wants to sell as many of its products and licenses as possible). So, do I need more of Salesforce product knowledge in order to be attractive to Salesforce, OR do I pitch that I can custom build any feature to replicate Salesforce’s products’ behavior?

**ANSWERS**

1. Working with Offshore Technical Team:

Procedure:

Define clear communication protocols (regular meetings, status updates).

Ensure contracts, NDAs, and IP agreements are in place.

Clearly outline roles and responsibilities.

Decide on the tools for project management, code repositories, and communication.

2. Team Composition and Size:

Initially, consider onboarding:

1x Technical Lead/Architect

2x Salesforce Developers

1x Business Analyst

1x Project Manager

1x QA Specialist

As your consultancy grows, you can scale the team accordingly.

3. Salesforce Certificates for Consultants:

At a minimum, consider obtaining:

Salesforce Certified Administrator

Salesforce Certified Platform Developer I

Salesforce Certified Service Cloud Consultant

Salesforce Certified Sales Cloud Consultant

4. Work Experience as Company Experience:

Yes, your personal work experience as a full-time employee, especially if it is directly related to Salesforce implementations, can and should be presented as your qualifications and experience when you’re pitching to clients or partners.

5 & 5.1 Preferred Skills and Product Knowledge:

With your extensive experience, you are well-positioned to serve a range of client needs. The demand for specific skills can vary, but here's how to navigate your two-sided coin:

Being Attractive to Salesforce: Having a deep knowledge of Salesforce products will make you more attractive as a Salesforce partner. Salesforce is more likely to recommend consultants who encourage the use of their ecosystem.

Appealing to Clients: On the other hand, many clients are looking to save on license costs. If you can offer custom-built solutions that reduce their reliance on pricier Salesforce products, this can be a strong selling point.

Balancing Act: You might consider positioning yourself as a flexible consultant who deeply understands Salesforce’s suite of products but is also skilled at developing cost-effective custom solutions when they are in the client’s best interest.

Strategic Suggestions:

To pitch to clients, focus on your strengths. Highlight your extensive experience in Service Cloud, as well as your ability to implement cost-saving custom solutions.

To be attractive to Salesforce, emphasize your deep product knowledge and your commitment to encouraging clients to adopt a wide range of Salesforce solutions.

Additional Tips:

Considering your focus on Service Cloud, your skills around chatbots, omni-channel configurations, and integrations are highly valuable. These are areas where many businesses struggle and would appreciate expert guidance.

The demand for Salesforce consultants with strong security knowledge (e.g., SSO, OAuth 2.0, Salesforce's security model) is growing, so that’s a definite plus.

Lastly, the fact that you are an excellent developer (OOP concepts, SOLID principles, efficient SOQL/DML use, etc.) is a strong selling point. Many Salesforce consultancies are started by people with a sales or business background, so your technical skills are a unique strength that should be highlighted in your marketing materials.

**FSL**

I forgot to mention about FSL (Field Service Lightning). I implemented such FSL features as:

- Geofencing

- Agent Dashboard UI customization (GANTT chart)

- FSL Mobile app customization

- Work Item assignment based on Field Adjuster schedule

- Automatic SMS notification to customer about Field Adjuster's arrival time - "On Time or Running Late"

- Push notification to Field Adjusters about - Appointment scheduling and assignment, "Task/Work period wrap up", reminder to submit "post-appointment" data and images.

Framework for a presentation that showcases both you and your new consultancy, "The Digital Ronin." This presentation can be tailored depending on whether you are approaching a potential customer or Salesforce itself. It highlights your extensive experience and deep knowledge in Salesforce, with a special focus on Service Cloud and Field Service Lightning (FSL).

Slide 1: Title Slide

Company Logo: The Digital Ronin

Tagline: “Mastering Salesforce, One Client at a Time”

Your Name and Title: [Your Name], Founder and Lead Salesforce Consultant

Contact Info: [Your email and phone number]

Slide 2: About Us

Introduction to The Digital Ronin as a Salesforce consultancy specializing in Service Cloud and FSL implementations.

Mention of the company's flexible approach, customizing Salesforce to fit each client's unique needs.

Slide 3: The Digital Ronin's Philosophy

Bullet points emphasizing customer focus, results, and adaptability.

Quote: “We believe in crafting solutions as unique as your business.”

Slide 4: Our Expertise

Bullet points listing your skills and experience, e.g., Service Cloud, FSL, OOP concepts, SOLID Principles, LWC, AURA, VisualForce, etc.

Slide 5: Field Service Lightning Mastery

Use this slide to detail your FSL-specific skills, such as Geofencing, Agent Dashboard UI Customization, etc.

Include screenshots or diagrams if possible.

Slide 6: Case Study: Seamless Field Service

A brief, impactful story of how you solved a problem for a past client using FSL.

Before/After snapshot.

Testimonial quote if available.

Slide 7: Why The Digital Ronin?

Points on what sets you apart: your deep technical knowledge, extensive experience in Service Cloud and FSL, focus on cost-effective solutions, etc.

Slide 8: Our Process

Outline of your consulting process from initial consultation to project completion and follow-up.

Mention the free 1-hour consultation you offer.

Slide 9: Salesforce Partnership

If presenting to Salesforce, use this slide to discuss your commitment to promoting Salesforce products, your certifications, and your strategy for ongoing learning and alignment with Salesforce's goals.

Slide 10: Ready to Transform Your Salesforce Experience?

Call to Action: Invite them to reach out to start a conversation.

Repeat Contact Info: [Your email and phone number]

Slide 11: Thank You

A thank you note for their time and attention.

Notes:

Keep slides visually engaging and not too text-heavy. Use images, diagrams, and infographics where possible.

For customer presentations, focus on the problems you solve, your process, and the results you deliver.

For Salesforce presentations, emphasize your certifications, commitment to the Salesforce platform, and strategy for encouraging clients to adopt more Salesforce products.

Handouts/Leave-Behinds:

Consider creating a one-page summary of your services and expertise that you can leave with prospects after a meeting. This should be a visually attractive, easy-to-read summary that reinforces the key points from your presentation.

Finally, remember that stories are powerful. Whenever possible, use specific examples from your past work to illustrate how you solve problems and deliver results for your clients.