

SALESFORCE MIGRATION GUIDE

Migrate off Salesforce and save big bucks to invest in more valuable things like sales people, or marketing programs...or a skunkwork dev team to develop that killer new feature. All without completely screwing up your business.



This guide will be repulsive to some, or interesting to others.

If you are facing a massive Salesforce renewal in the face and wonder what the hell that investment gets you, you fit in the latter category. If you eagerly pay it, stop reading this now.

This guide only applies to B2B Tech companies. The customer journey in tech is very different from healthcare, finance, retail, or other industries. TekStack has built functionality specific to B2B Tech companies such as SaaS companies, IT Service Providers, or Professional Services companies. The platform is built on the Microsoft technology stack so its proposition is best with companies running Office 365.

CAN YOU ACTUALLY SWITCH PLATFORMS?

Short answer: Hell Yes.

A successful move is contingent of three things:

1. How you manage the change with your team
2. The quality of your data (untidy data gets exposed when you lift the covers)
3. Ensuring that required processes are fully supported in features

Change Management is really about user adoption - how well will your team members adapt to change. You might have experienced this in the last few years when users had to move from Classic to Lightning, the change, if not managed well, could have been challenging. But many companies look at this change as an opportunity to re-align SOPs, and actually train their users. It also gives you a chance to shed all those weird customizations and buttons that aren't used.

Data Migration is, technically speaking, dead easy with the capabilities of both Salesforce and Microsoft Power Platform. The big challenge is that this is like cleaning out your basement closet. So much useless stuff that is old or probably inaccurate. When the door is opened, you realize this and use the opportunity to clean it up. Probably for the best anyways.

You may be reliant on certain Salesforce features, custom reports, or side-car applications or processes. You'll want to make sure these are supported in your jump to a new platform. You also don't want to go from an market leading application to a dog (read niche player).



HOW TEKSTACK DOES IT

TekStack manages these three components as part of its Salesforce Migration Framework.

Change Management

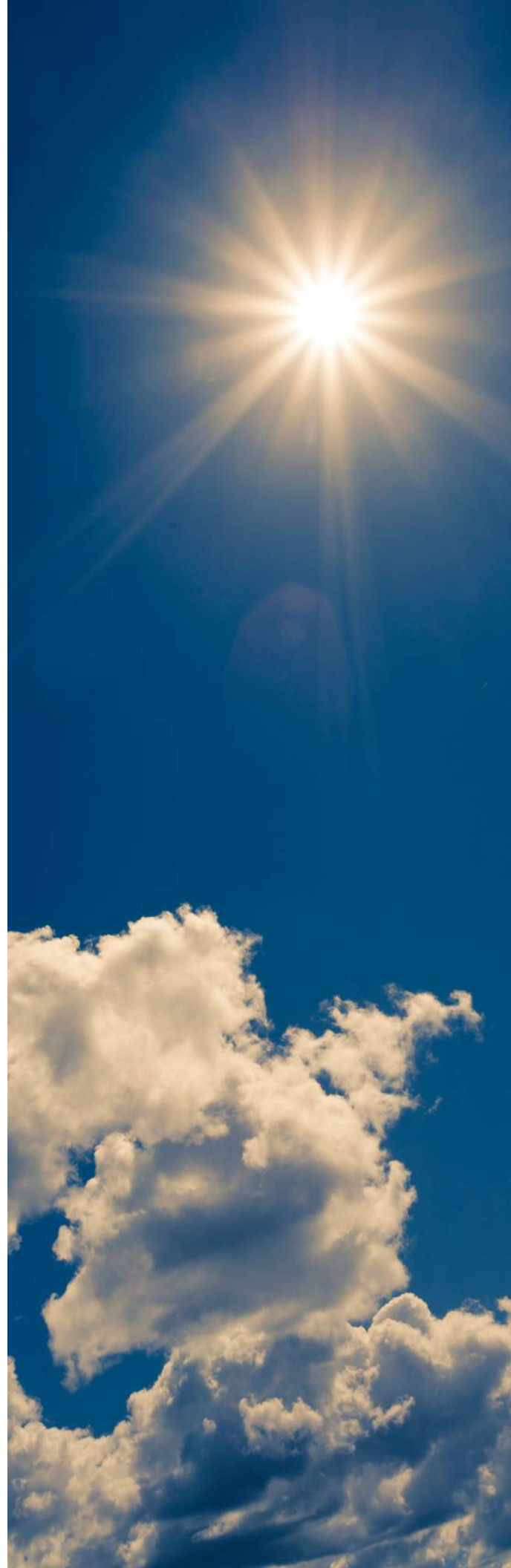
Unlike your Salesforce implementation experience, TekStack is one throat to choke. The product vendor is also the implementation partner, and provides support and upgrades. Our Hybrid project implementations combine sprints so that we can make tweaks, with the formal structure that ensures UAT, and training is complete before go-live.

Data Migration

Our Framework provides an integration mapping for standard Salesforce data schemas. Our table structure is virtually identical and makes for an easy migration.

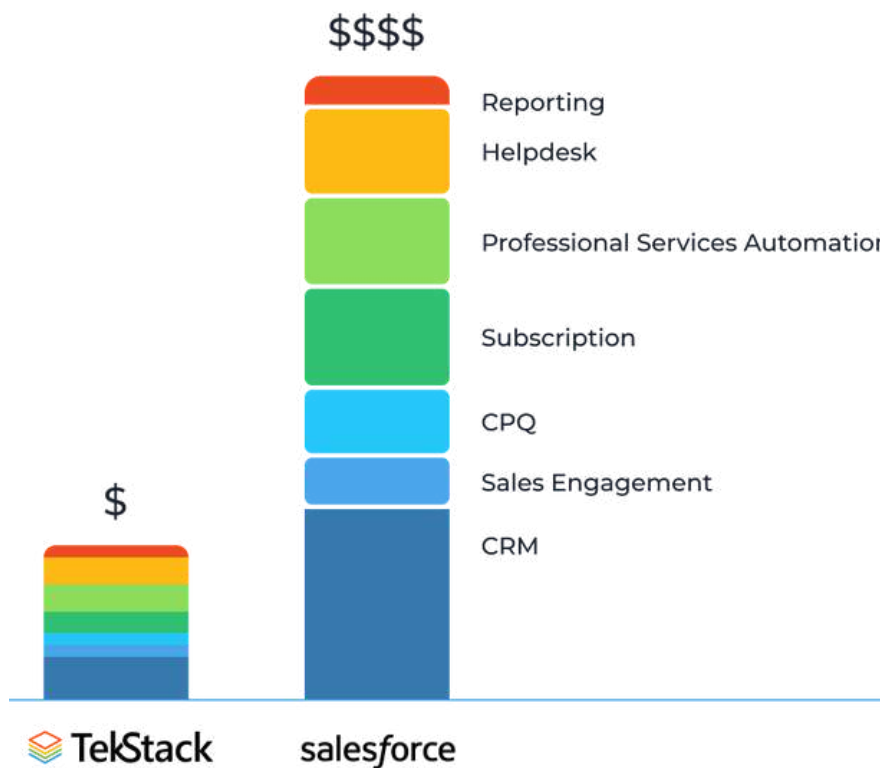
Feature Parity

We are industry experts in B2B software, and have pre-built every SOP so that we ensure user productivity, clean data, and offer pre-built reports you need. It's most likely that TekStack will consolidate your use of side-car applications like subscription management, PSA, support, or other tools. You don't need to rip and replace all of it, but you could.



WHAT ARE THE SAVINGS?

Pretty massive. We have a handy little calculator that allows you to compare the cost of Salesforce next to TekStack. The savings come in the form of reducing overlapping licenses, and lower cost user licenses. Factor on top of that savings with the fact that TekStack includes application support, upgrades, and multiple sandboxes in our deployments.



How much could you save with improved revenue operations?
Crunch some numbers with our ROI Calculator

[CALCULATE NOW](#)

FEATURE COMPARISON

TekStack is a certified Microsoft application based on Microsoft's Power Platform. Power Apps is a lot like Force.com but according to Gartner, it's actually better (more about this later). What we do is take that platform and build the specific features and business processes that B2B Tech companies need to operate.



When you look at the entire customer journey, Salesforce Sales Cloud is really just the CRM bit. You are likely adding third party apps to cover off the other areas. This is fine, but over time these apps become expensive, have broken integrations, multiple systems of record, overlap licensing, and make it impossible to get a straight answer out of vendors.

TekStack brings all of these department silos into a single app. The power of that is tremendous. Imagine seeing every step of the customer's journey from one screen. Having only one contact record, one account record connected to every part of the business. Every hand-off flows from one department to the next. Example, marketing to sales, sales to deal desk, deal desk to finance, deal desk to services team, services team to support; and so on.

Included Functions for a SaaS business	TekStack	Salesforce	With Salesforce, you'll need
Outbound Sequencing	✓	✗	Outreach
Built-in Pricing & Quoting	✓	✗	Salesforce CPQ
Subscription Billing	✓	✗	SaaSOptics
Professional Services Automation	✓	✗	Mavenlink
Customer Support Module	✓	✗	Zendesk
Customer Success	✓	✗	ChurnZero
Business Intelligence	✓	✗	Tableau

FEATURES



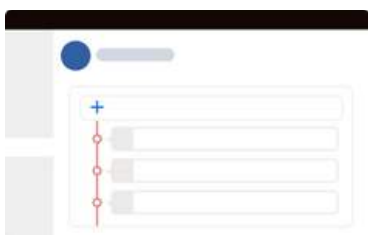
CRM

Built for B2B software companies - everything your sellers need to build pipe, delight and engage buyers, and manage opportunities.



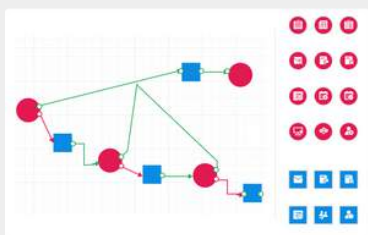
Help Desk

Makes sure your account relationships and stages are up to date by incorporating Forrester's B2B Revenue Waterfall. Related contacts cascade from key account information so all your data is in sync.



Outbound Sequencing

Increase the productivity of your outbound sales team by automating sequences. 100% native, works with TekStack or Dynamics 365 for Sales.



Marketing Automation

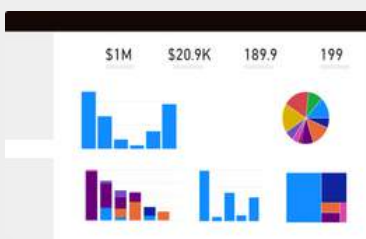
Our partnership with Click Dimensions provides native marketing automation capabilities - giving you all the capabilities you need to scale your marketing success.

FEATURES



Professional Services Automation

Transition to fixed priced or managed services delivery, get the most out of your existing team, and improve your customer's project delivery and onboarding experience.



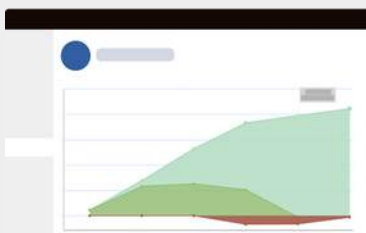
Key Metrics Reporting

No need to build reporting yourself. TekStack has all the key indicators you need out of the box, delivered with PowerBI.



Customer Success

Your software company's success is dependent on your customer's success. Track customer health, get a 360 degree view and run playbooks with TekStack.



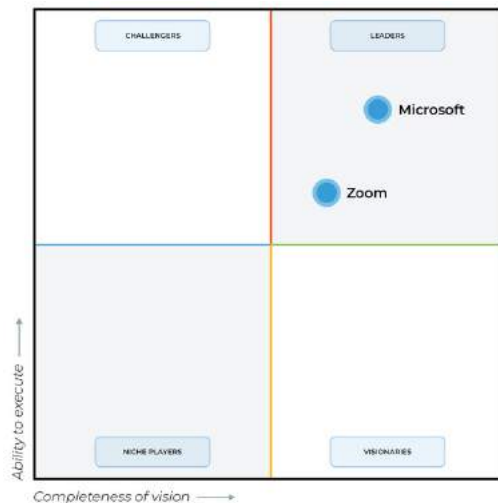
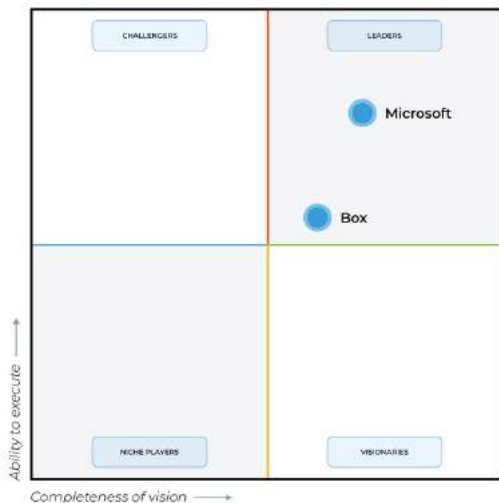
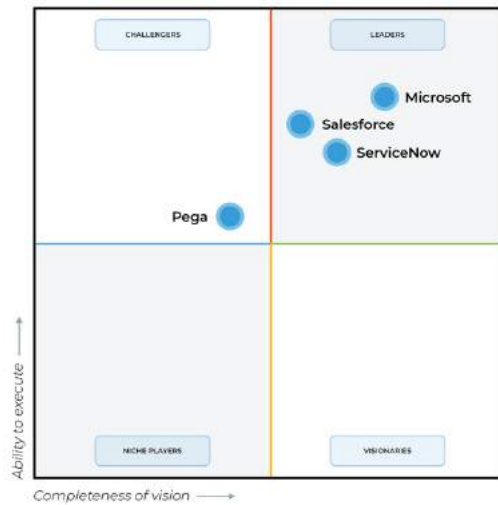
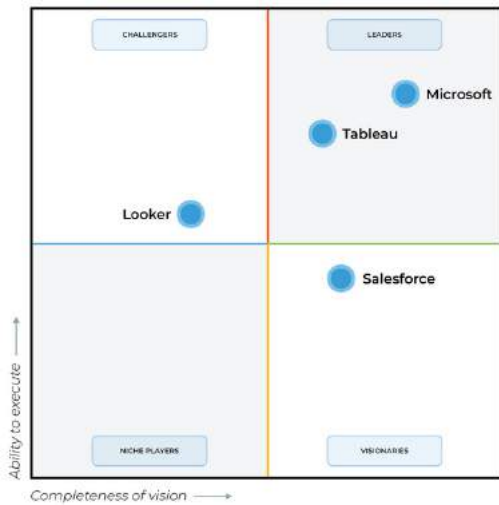
Subscription & Renewal Management

Why are you managing your most important revenue in a spreadsheet? TekStack gives you the tools you need to manage your ARR - track revenue, manage renewals and automate invoicing.



SALESFORCE VS MICROSOFT

From a platform perspective, Microsoft is kicking it. Not only is TekStack's underlying platform, Power Apps, the leader in the segment; TekStack also connects to the entire Microsoft stack from reporting (Power BI), collaboration (Teams), and document management (SharePoint). So if you are a company that is running Office 365 your users will find immediate productivity gains with TekStack because everything is connected.



SUPPORT

On top of buying extra apps to get you the services you need, should product support cost you extra? We don't think so. At TekStack we include it within your monthly fee - and there's no cap!

Unlimited and responsive support is included in your monthly subscription. There's no need to purchase advanced support plans or resort to third-party support services.

TekStack also provides a repository of support articles in our Customer Support Center, for you to refer to and keep for whenever you need.

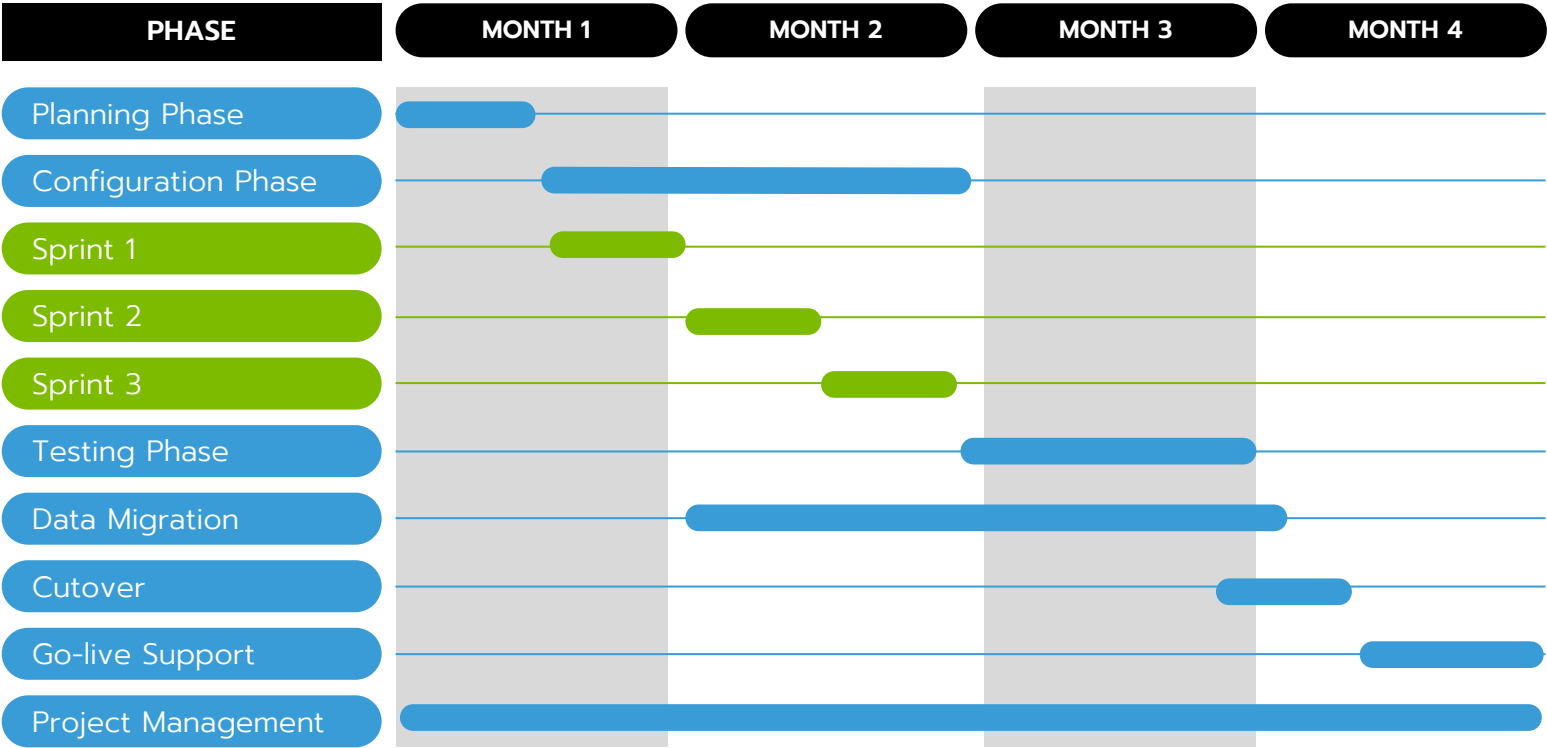
- ✔ Unlimited support included
- ✔ Sandbox environments included
- ✔ One throat to choke
- ✔ Fully documented

SALESFORCE MIGRATION

TekStack makes it easy to get started.

We recognize that you have better things to do, so we take most of the work away from your team.

HYBRID PROJECT APPROACH - 90 DAY GO LIVE

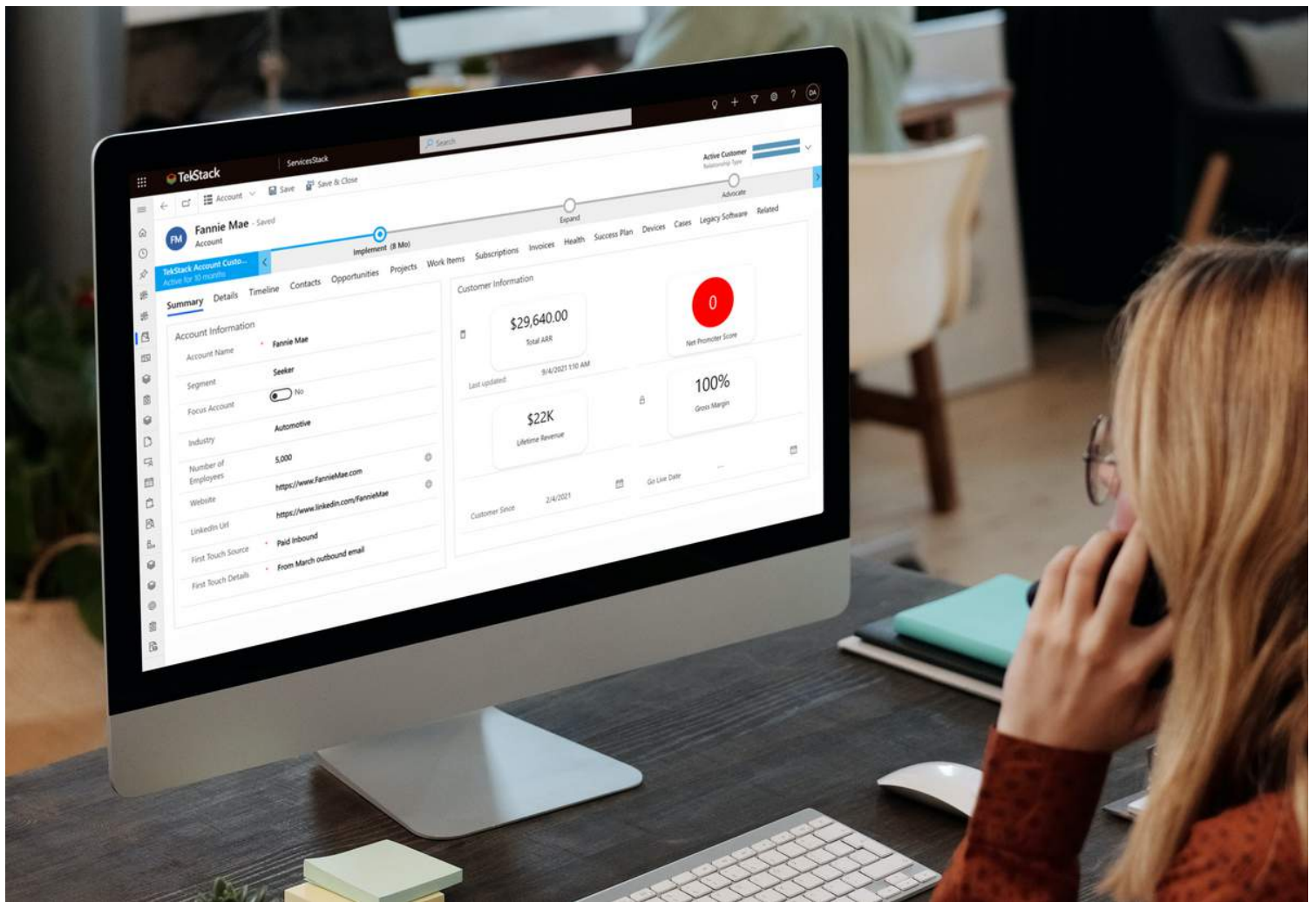


WHAT'S NEXT?

Schedule a conversation, we'll be delighted to show you what we do for B2B Tech companies. We are very transparent and forthcoming, no games with us.
www.tekstack.com/salesforce.

GET IN TOUCH

Phone: (833) 766-8677
hello@tekstack.com
www.tekstack.com



TekStack ServicesStack

Account: Fannie Mae - Saved

Summary Details Timeline Contacts Opportunities Projects Work Items Subscriptions Invoices Health Success Plan Devices Cases Legacy Software Related

Account Information

Account Name	Fannie Mae
Segment	Seeker
Focus Account	No
Industry	Automotive
Number of Employees	5,000
Website	http://www.FannieMae.com
LinkedIn List	https://www.linkedin.com/FannieMae
First Touch Source	Paid inbound
First Touch Details	From March outbound email

Customer Information

Total ARR	\$29,640.00	Net Promoter Score	0
Lifetime Revenue	\$22K	Gross Margin	100%
Customer Since	2/4/2021	Go Live Date	