

FORMAT // SPRINT

HEALTHCARE · NON-PROFIT · SALESFORCE

Largest home-based healthcare org in NYC

Sequencing and ROI for a multi-year CRM and tech-investment roadmap.

Independent advisor to sequence and pressure-test a heavy slate of CRM and data initiatives — Salesforce CCSS, MDM, Snowflake. Eight weeks delivered the strategic spine and ROI case to sustain executive investment.

DURATION	FEE	FORMAT	TIED TO
8 weeks	\$25–\$50k	Sprint	Go-Live
Phase-2 sprint	Starting at · fixed scope	Independent advisor	Salesforce · Aug 2022

// APPROACH

Three-step methodology, anchored to a single decision.

- 01 Run a People–Process–Tech Maturity Assessment**
Directional maturity scoring across knowledge transfer, governance, and roadmap-readiness. Surfaced gaps in IT–Business alignment and adoption leadership.
- 02 Frame the 'north star' and risk surface**
Articulated a Program Charter to align stakeholders on vision, value, and governance. Maintained a running risk log scoped to Phase 1, 2, and 3.
- 03 Sequence the roadmap around technical dependencies**
Ordered MDM, Snowflake, and Salesforce work-streams against critical-path interfaces. Translated dependencies into a Roadmap Placemat for executive planning.

// DELIVERABLES

What lands in the inbox at the end of the Sprint.

CHARTER

CRM Program Charter

POWERPOINT

'North star' vision deck for stakeholder, governance, and exec alignment.

WORKBOOK

Knowledge Transfer Workbook

WORKBOOK

Internal Salesforce capability building and IT-Business alignment artifact.

ROADMAP

Future Roadmap Placemat

1 - PAGER

Sequenced view of MDM, Snowflake, and Salesforce dependencies.

// COVERAGE

3

PHASE-KEYED RISK LANES

5

CORE DELIVERABLES

10

USE CASES IN SCOPE

3+

TECH WORK-STREAMS SEQUENCED

// OUTCOME

Platform launched on schedule, stable and MVP-focused. The Program Charter and Roadmap Placemat became the executive reference for subsequent multi-year investment cycles.

FORMAT · SPRINT · 8 WEEKS

If this Sprint feels close to what you need —

Initial conversations are confidential, complimentary, and take thirty minutes.

→ BRANDON@ASHTONSTRATEGIES.COM → [832.771.0088](tel:832.771.0088) → ASHTONSTRATEGIES.COM/CONTACT