

FORMAT // SPRINT

ENERGY · WHOLESALE FUEL · RETAIL

A regional petroleum & energy distributor

Salesforce strategy, MVP scope, and 5-year cost roadmap ahead of contract.

Four-week sprint to prioritize Salesforce initiatives and frame the ROI case before a major technology investment — MVP scope, 5-year roadmap, and rough-order-of-magnitude pricing across consulting and licensing.

DURATION	FEE	FORMAT	TIED TO
4 weeks	\$25–\$50k	Sprint	Contract
Strategy foundation	Starting at · fixed scope	Strategy · MVP · Roadmap	Q4 investment decision

// APPROACH

Three-step methodology, anchored to a single decision.

- 01 Anchor on the C-Level Ask**
Established four explicit deliverables for sales leadership: strategy foundation, MVP scope, ROM cost guidance, and a realistic 5-year roadmap based on energy-vertical best practices.
- 02 Sequence the Five-Year Roadmap**
Mapped Strategy Foundation → MVP+ → Scale & Adoption → Extend to Field Service & Partners → Run & Maintain. Each year sized for user counts, edition mix, and product priority.
- 03 Frame Total Cost of Ownership**
Separated consulting (one-time) from licensing (annual recurring) so the sponsor saw a full investment picture before signing — including discount expectations and edition guidance.

// DELIVERABLES

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

STRATEGY	<p>Salesforce Strategy Foundation</p> <p>4-month follow-on engagement scope and MVP build plan.</p>	SCOPE
ROADMAP	<p>5-Year Cost Roadmap</p> <p>Services + licensing combined view: ROM costs, user counts, and edition mix.</p>	Y1 → Y5
ROI	<p>ROI Decision Pack</p> <p>3.5 hrs/user/day saved across 150 sales users → 4.4× projected return.</p>	SCENARIO

// COVERAGE

5	4.4×	\$1.6M	3
YEAR ROADMAP HORIZON	PROJECTED ROI ILLUSTRATION	Y1-Y2 SERVICES ROM	MVP CAPABILITY STREAMS

// OUTCOME

Sales leadership got a defensible Salesforce roadmap – clean cost separation, realistic MVP scope, and an ROI case strong enough to anchor the Q4 contract decision.

FORMAT · SPRINT · 4 WEEKS

If this Sprint feels close to what you need –

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

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