



BY SIMPLY SCALE

# The \$0 to \$100M CRM Playbook

The Exact Salesforce System. Stage by Stage.

A stage-by-stage guide to building a Salesforce system that matches where your business actually is, and a precise map for getting to the next level. Built for RevOps leaders, Salesforce admins, and founders who refuse to guess.



# Where Are You Today?

Find your current stage below. Each stage defines where your business is right now, the primary constraint holding you back, and what your Salesforce should be doing to move you forward.

STAGE	ARR RANGE	TEAM SIZE	PRIMARY CONSTRAINT	DEPARTMENT FOCUS	SALESFORCE PRIORITY
S0	\$0	1 (Founder)	<i>Not sure people want this</i>	Product	Tracking what people hate
S1	\$1K to \$100K	1 (Founder)	<i>I don't know how to sell</i>	Sales	Creating your sales script
S2	\$100K to \$1M	1 (Founder)	<i>People don't buy every day</i>	Marketing	Tracking all leads & your efforts
S3	\$1M to \$3M	1 to 4 Employees	<i>Everything is messy and busy</i>	Operations	Automating your team's work
S4	\$3M to \$10M	5 to 9 Employees	<i>We're trying to help everyone</i>	Product	Blocking all the bad leads
S5	\$10M to \$25M	10 to 19 Employees	<i>We don't make enough money</i>	Customer Success	Tracking what else they want
S6	\$25M to \$50M	20 to 49 Employees	<i>We have too much waste</i>	Sales & Marketing	Finding where money is lost
S7	\$50M to \$75M	50 to 99 Employees	<i>Everything is a big mess</i>	Operations & IT	Giving every team their own view
S8	\$75M to \$100M	100 to 249 Employees	<i>1 person can't know everything</i>	HR / Recruiting	Grading your team's experts
S9	\$100M+	250 to 500 Employees	<i>We stopped growing fast</i>	R&D / Strategy	Predicting your next big move

## HOW TO USE THIS BLUEPRINT

Identify the row that best describes your **current ARR and primary constraint**. That's your stage. Each page in this playbook shows you the exact Salesforce systems to build *right now* — and the dashboards that tell your leadership team what's working. Don't build Stage 5 features if you're a Stage 2 company. The order matters.

## The Proof of Life Phase

**How We'll Use Salesforce:** At this stage, your business is a research project. You're giving the product away for free to see if it's good. If you don't track why people are saying yes or no, you're just guessing. We use Salesforce to turn your conversations into data.

### SALESFORCE PRESCRIPTION — THE BUILD

DEPARTMENT	THE PAIN	THE SALESFORCE BUILD
Product	<i>Not sure if people want what you have</i>	<b>Feedback Object:</b> Custom fields to tag every lead with their 'Desired Feature' : so you build what the market actually demands.
Marketing	<i>No tools or way to find testers</i>	<b>Campaign Tracker:</b> Track where beta testers come from (LinkedIn, DMs, etc.) so you know where to focus energy.
Sales	<i>Don't know how to sell or who to talk to</i>	<b>Lead Status Flow:</b> A simple Discovery Pipeline (New → Contacted → Testing → Feedback) so no beta tester falls through the cracks.
Customer Service	<i>Free customers tell you everything that's wrong</i>	<b>Case Management Lite:</b> Log every bug or complaint from free users. This becomes your product to-do list.
IT / Systems	<i>Doing everything manually</i>	<b>Web-to-Lead:</b> A landing page form that puts testers directly into Salesforce : stop losing names in email or DMs.
Finance	<i>Business makes no money yet</i>	<b>Value Hypothesis Tracking:</b> Track 'Estimated Budget' for testers : build pricing data before you ever send an invoice.

#### ★ BIG WIN

### Product-Market Fit Dashboard

*Instead of a Sales Pipeline, visualize the 'Free to Paid' bridge.*

- **The 'Hate' List**  
Top 3 reasons people aren't paying (e.g., 'Missing Feature X').
- **High-Activity Testers**  
The 5 people using the free version most : your first 5 closing opps.
- **Acquisition Source**  
Which channel brings in the highest quality feedback.

#### MY MAP FOR STAGE 0

Right now, your biggest risk is building something nobody wants. The 'Map' for Stage 0 is a Feedback Engine in Salesforce. We track every 'No' so we can turn them into 'Yeses' by next month. This is how we move from Stage 0 to actually getting paid.

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## The First Dollar Phase

ARR TARGET  
\$1K to \$100K

TEAM  
1 (Founder)

SF FOCUS  
Creating your sales script

**How We'll Use Salesforce:** You have a product people liked for free. Now we need to see if they'll pay for it. The biggest risk is that you don't know how to sell yet. We use Salesforce to give you a Sales Script and track who is actually giving you money so you can do it again.

### SALESFORCE PRESCRIPTION — THE BUILD

DEPARTMENT	THE PAIN	THE SALESFORCE BUILD
Sales	<i>Don't know how to sell</i>	<b>Opportunity Stages:</b> A 3-step pipeline (Demo → Pitch → Closed) with 'Sales Guidance' text to remind you what to say at each step.
Product	<i>Product isn't good enough to sell yet</i>	<b>Win/Loss Analysis:</b> A mandatory close field : 'Why did they buy/not buy?' : to help you fix the product.
Marketing	<i>Good results from free users, need paying users</i>	<b>Lead Source ROI:</b> Track which free users converted to paid so you know where to find more buyers.
Customer Service	<i>Paid customers have higher standards</i>	<b>Onboarding Checklist:</b> Automated tasks that fire the moment a deal closes so the customer feels taken care of immediately.
IT / Systems	<i>No way to get paid or track it</i>	<b>Simple Quote-to-Cash:</b> Integrate a 'Pay Now' link (Stripe) directly on the Salesforce Opportunity : zero friction to getting paid.
Finance	<i>Business makes no money yet</i>	<b>Revenue Forecast:</b> A report showing 'Closed Revenue' vs. 'Expected Revenue' from your active pipeline.

#### ★ BIG WIN

### The First Dollar Pipeline

*Instead of a list of names, a visual pipeline focused on Momentum.*

- **Conversion Rate (Free → Paid)**  
What % of beta testers actually pulled out their credit card?
- **Time to Close**  
How many days from first 'Hello' to first 'Payment'?
- **Sales Script Helper**  
Which value proposition is mentioned most in your winning deals?

#### MY MAP FOR STAGE 1

You've proven the idea works, but now you're hitting the 'Sales Wall' and winging every call. My Map for Stage 1 is to build your Sales Playbook directly into Salesforce : track exactly what makes people say 'Yes' so you can stop guessing and start scaling.

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## The Consistency Engine

ARR TARGET  
**\$100K to \$1M**TEAM  
**1 (Founder)**SF FOCUS  
**Tracking all leads & your efforts**

**How We'll Use Salesforce:** You've proven people will pay, but your income is a roller coaster. The only way to fix this is consistency. We use Salesforce to track your Daily 100 outreach and make sure your marketing isn't a start-stop mess.

### SALESFORCE PRESCRIPTION — THE BUILD

DEPARTMENT	THE PAIN	THE SALESFORCE BUILD
Marketing	<i>Lead flow is inconsistent (Start/Stop)</i>	<b>Rule of 100 Tracker:</b> A dashboard that resets every 24 hours. If the bar isn't green, you haven't done enough to earn tomorrow's leads.
Sales	<i>Sales conversions are inconsistent; no set script</i>	<b>Script Integration:</b> 'Guided Action' components on the Lead record : your full pitch script right in front of you during every call.
Product	<i>Paying customers have higher expectations</i>	<b>Product Feedback Loop:</b> A 'Bug/Feature' related list on every Account. When a customer complains, it's logged immediately.
Customer Service	<i>Dealing with disappointed customers</i>	<b>Testimonial Capture:</b> An automated task that triggers 14 days after a sale to collect social proof and reviews.
IT / Systems	<i>Using free trials and credits, no real stack</i>	<b>Lean CRM Setup:</b> Move from spreadsheets to a Starter CRM structure built to scale without painful data migration later.
Finance	<i>Don't track money or know how to pay yourself</i>	<b>Expense vs. Revenue Tracking:</b> A dashboard comparing daily ad spend vs. daily sales : real-time ROI in one view.

#### ★ BIG WIN

### The Consistency Dashboard

*The business owner needs to see that Activity = Results.*

- **Rule of 100 Progress**  
A daily burn-down chart of outreach activities (DMs, Calls, Emails).
- **Lead Velocity**  
New leads entering the system this week vs. last week.
- **The 'Disappointment' Log**  
Customer complaints sorted by Product Area : know exactly what to fix.

#### MY MAP FOR STAGE 2

You're in the 'Roller Coaster' phase : exhausted, never sure if next month is a \$0 month. My Map for Stage 2 turns Salesforce into your Consistency Coach. We install the Rule of 100 tracker so you know exactly how much work is required to keep your calendar full.

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## The Founder Freedom Phase

ARR TARGET  
\$1M to \$3M

TEAM  
1 to 4 Employees

SF FOCUS  
Automating your team's work

**How We'll Use Salesforce:** You have a small team but you're still doing all the heavy lifting. If you don't build systems, your team just waits for you to tell them what to do. We use Salesforce to build the 'Rules of the Road' so the business can run even when you aren't looking.

### SALESFORCE PRESCRIPTION — THE BUILD

DEPARTMENT	THE PAIN	THE SALESFORCE BUILD
Operations	<i>Too much for one person to do</i>	<b>Task Automation:</b> Salesforce Flows auto-assign tasks to new hires (New Lead → Assign to Rep → Set Follow-up) so no one waits for instructions.
Marketing	<i>Leads aren't buying fast enough; too many bad leads</i>	<b>Lead Scoring &amp; Nurture:</b> A 'Long-Term Nurture' flow for cold leads plus a 'Quality Score' so the team knows who is ready to buy.
Sales	<i>Not enough time to talk to good leads</i>	<b>Calendar Integration:</b> Connect Salesforce to Calendly/Outlook so leads book themselves : remove you from scheduling entirely.
Product	<i>No time to fix everything</i>	<b>Priority Support Queue:</b> A 'Most Complained About' report. Fix the one thing that stops 80% of the headaches.
IT / Systems	<i>Tools you don't use cluttering everything</i>	<b>Tool Consolidation:</b> Audit your app stack. If it isn't connected to Salesforce, kill it or integrate it. Single Source of Truth.
Finance	<i>People paid informally, no contracts, no tax withholding</i>	<b>Contract Management:</b> Store W-9s/contracts in Salesforce, track payout milestones : books are clean and legal for the first time.

#### ★ BIG WIN

### The Founder Freedom Dashboard

*Success here isn't revenue : it's Team Autonomy.*

- Lead Response Time (By Rep)**  
How fast your team (not you) is calling leads.
- Task Completion Rate**  
Are the SOPs being followed? Shows who's working and who's stuck.
- Automated Touchpoints**  
How many emails and tasks Salesforce handled today that you didn't touch.

#### MY MAP FOR STAGE 3

You've hit the 'Founder Trap' : hired people to help but now you're just managing them. My Map for Stage 3 installs SOPs directly into Salesforce. We automate the busy work so your team knows exactly what to do without you saying a word.

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## The Niche Down Phase

ARR TARGET  
\$3M to \$10MTEAM  
5 to 9 EmployeesSF FOCUS  
Blocking all the bad leads

**How We'll Use Salesforce:** You're busy but not growing as fast as before because you're trying to be everything to everyone. We use Salesforce to find your Perfect Customer and build a wall that keeps the Time Wasters out.

### SALESFORCE PRESCRIPTION — THE BUILD

DEPARTMENT	THE PAIN	THE SALESFORCE BUILD
Product	<i>Too many directions from too many types of customers</i>	<b>Avatar Tagging:</b> A 'Customer Segment' field. Run a report to find which segment has the highest profit and fewest headaches.
Marketing	<i>Too many unqualified leads clogging the system</i>	<b>Lead Shield (Validation):</b> Required qualification questions on web forms. If a lead doesn't fit, Salesforce auto-disqualifies them before your team ever sees them.
Sales	<i>Speed to contact dropping; no performance metrics</i>	<b>SLA Dashboards:</b> A 'Speed to Lead' tracker. If a qualified lead isn't called within 5 minutes, a Slack alert fires.
Customer Success	<i>No metrics for CS; don't know who's happy</i>	<b>Health Scoring:</b> A simple 'Account Health' formula based on product usage frequency and recent support tickets.
HR / Recruiting	<i>Wasting time interviewing bad candidates</i>	<b>Recruiting Pipeline:</b> A custom object to track applicants with the same rigor as sales leads : with automated rejections for non-starters.
Finance	<i>Accounting is lumpy; random one-line expenses</i>	<b>Expense Categorization:</b> Tag every dollar to a specific 'Growth Initiative' so you can see what's actually generating ROI.

#### ★ BIG WIN

### The Niche Finder Dashboard

*The business owner needs to see the Power of No.*

- **Lead Quality %**  
Qualified vs. Disqualified leads : success = more disqualifications.
- **Revenue by Avatar**  
Which customer type brings the most money with the least support tickets?
- **Speed to Contact**  
Leaderboard showing which reps are hitting the 5-minute contact goal.

#### MY MAP FOR STAGE 4

You've reached the point where 'More' is actually hurting you. Your team is exhausted talking to people who will never buy. My Map for Stage 4 turns Salesforce into a Filter : Niche Down your system so your team only spends time on your Gold customers.

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## The Retention Engine

ARR TARGET  
\$10M to \$25M

TEAM  
10 to 19 Employees

SF FOCUS  
Tracking what else they want

**How We'll Use Salesforce:** You have a great business, but you're leaving money on the table because customers aren't sticking around or buying more. We use Salesforce to track the Customer Journey so you can see exactly where they get stuck and what they want to buy next.

### SALESFORCE PRESCRIPTION — THE BUILD

DEPARTMENT	THE PAIN	THE SALESFORCE BUILD
Product	Customers have nothing else to buy; churn is rising	<b>Asset &amp; Entitlement Tracking:</b> Track exactly what products a customer owns, triggering 'Upsell Alerts' when they're ready for the next level.
Marketing	Qualified leads are too expensive; CAC is too high	<b>Lead Scoring 2.0:</b> Advanced scoring for 'High Intent' leads plus 'Lookalike Reports' targeting people who look like your highest-LTV customers.
Sales	Customers sold on expectations that don't match delivery	<b>Hand-off Automation:</b> A mandatory 'Discovery-to-Delivery' bridge. Everything the rep promised is automatically routed to the Success team.
Customer Success	High churn; no way to track NPS/CSAT	<b>Automated Feedback Loops:</b> CSAT/NPS surveys that fire 30 days after purchase. A dashboard tracking 'Refund Rate by Sales Rep.'
IT / Systems	Data lost when people leave; manual lead tracking	<b>History Tracking &amp; Ownership:</b> Field History Tracking plus auto-reassignment so no lead is orphaned when a rep quits.
Finance	Don't know how much you can reinvest to grow	<b>LTV:CAC Dashboard:</b> Shows exactly how many months it takes to break even on a new customer acquisition.

#### ★ BIG WIN

### The Customer Ascension Dashboard

How many customers are moving from Level 1 to Level 2?

- **LTV by Lead Source**  
Which marketing channel brings customers that stay the longest?
- **Expansion Revenue**  
How much revenue came from existing customers vs. new ones?
- **Churn Warning System**  
At-Risk accounts (no logins or email opens in 30 days) : Success calls before they quit.

#### MY MAP FOR STAGE 5

You've built a machine that catches customers but leaks them out the back. My Map for Stage 5 builds a Retention Engine : track Customer Health and automate Upsells so your current customers become your biggest source of new growth.

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## The Efficiency Audit

ARR TARGET  
\$25M to \$50M

TEAM  
20 to 49 Employees

SF FOCUS  
Finding where money is lost

**How We'll Use Salesforce:** You have a big team and a lot of customers, but you're losing money through the cracks. Everything feels slow and expensive. We use Salesforce to find those leaks and plug them : moving from 'doing things' to 'doing things perfectly.'

### SALESFORCE PRESCRIPTION — THE BUILD

DEPARTMENT	THE PAIN	THE SALESFORCE BUILD
Sales	<i>Closing efficiency drops; becomes inconsistent</i>	<b>Individual Coaching Dashboards:</b> 'Rep Scorecards' tracking conversion at every stage : see exactly where a rep fails so you can coach with precision.
Marketing	<i>Ads don't convert well to cold traffic; CAC rises</i>	<b>Multi-Touch Attribution:</b> Track every touchpoint before a purchase : tells Marketing which ads actually make money so they stop wasting spend on duds.
Product	<i>Improving two products slows improvements for both</i>	<b>Product Feedback Priority:</b> A 'Revenue Impact' field on feature requests : Salesforce tells the team what to fix to save the most revenue.
Customer Success	<i>Churn rises due to volume and new product confusion</i>	<b>Automated Attrition Alerts:</b> 'Red Flag' system : if a high-value customer gets 3+ tickets in a week, a Slack alert fires to the Manager immediately.
IT / Systems	<i>New people in; veterans leaving with tribal knowledge</i>	<b>Knowledge Base &amp; Wiki:</b> Move all 'how-to' info into Salesforce Knowledge. When a veteran leaves, their brain stays in the system.
Finance	<i>Spending money to grow but take-home is low</i>	<b>Profitability Reports:</b> Link Salesforce to financial data showing 'Profit per Account' : your biggest clients may be your least profitable.

#### ★ BIG WIN

### Better Beats More : Efficiency Dashboard

*The business owner needs to see Margin Improvement, not just revenue.*

- **CAC Payback Period**

How many months does it take for a new customer to pay for their acquisition cost?

- **Rep Conversion Leaderboard**

A 'Moneyball' view of which reps are most efficient with the leads they're given.

- **System Adoption Score**

Which expensive software tools are actually being used? Kill the Zombie Apps.

#### MY MAP FOR STAGE 6

You've built a massive engine but it's overheating. Spending more on ads and people but the bank account isn't keeping pace. My Map for Stage 6 is the Efficiency Audit : find exactly where your team is wasting time and where your marketing is burning cash.

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## The Command Center

ARR TARGET  
**\$50M to \$75M**

TEAM  
**50 to 99 Employees**

SF FOCUS  
**Giving every team their own view**

**How We'll Use Salesforce:** You have a massive team but the right hand doesn't know what the left is doing. Your systems were built for 10 people and they're breaking. We use Salesforce to triage the chaos by sorting your people, data, and customers into clear categories.

### SALESFORCE PRESCRIPTION — THE BUILD

DEPARTMENT	THE PAIN	THE SALESFORCE BUILD
IT / Systems	<i>Systems built for 10 people are bursting at the seams</i>	<b>Departmental Apps:</b> Specialized Lightning Apps for CS, Finance, and Ops : each team sees only the data relevant to their role.
Product	<i>Live system changes break everything for 100 people</i>	<b>Sandbox Strategy:</b> Formal DevOps process in Salesforce : test everything in Sandbox first. No more 'live' changes.
Marketing	<i>Can't see which department fuels which revenue stream</i>	<b>Advanced Campaign Hierarchy:</b> Every lead source categorized by 'Tier' and 'Channel' to map activity to revenue by department.
Sales	<i>Lead free-for-all; no territory management</i>	<b>Territory Management:</b> Auto-route leads based on geography, industry, or rep expertise to maximize close rates.
Customer Success	<i>Customers don't know what's happening next</i>	<b>Customer Journey Automation:</b> Salesforce sends proactive 'milestone' updates so customers never have to ask 'what's next?'
Finance	<i>Unchecked expenses and unauthorized discounts leaking margin</i>	<b>Approval Processes:</b> Any expense or discount over a set % must be approved in Salesforce before the deal moves forward.

★ **BIG WIN**

### The Command Center Dashboard

*The CEO needs to see Departmental Health, not just total revenue.*

- **Departmental Efficiency**  
Task Completion vs. Goal for Sales, CS, and Ops in one view.
- **Data Hygiene Score**  
How much messy or missing data exists : if you can't measure it, you can't manage it.
- **The 'Wait' Tracker**  
How long a customer waits between the Sale and the Welcome Call.

**MY MAP FOR STAGE 7**

You've reached 'Organized Chaos' : 50+ people but losing control of the details. My Map for Stage 7 Categorizes your Salesforce. We build walls and workflows between departments so everyone has exactly what they need without tripping over each other.

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## The Expert Platform

ARR TARGET  
\$75M to \$100M

TEAM  
100 to 249 Employees

SF FOCUS  
Grading your team's experts

**How We'll Use Salesforce:** You can't be the smartest person in every room anymore. You're hiring VPs and domain experts who are better than you at their specific jobs. We use Salesforce to give those experts the high-performance tools they need to win : not generic CRM features.

### SALESFORCE PRESCRIPTION — THE BUILD

DEPARTMENT	THE PAIN	THE SALESFORCE BUILD
HR / Recruiting	<i>Candidate quality is poor; no one knows everything</i>	<b>A-Player Scoring:</b> A weighted scoring system that matches candidates against traits of your top-performing employees.
Sales	<i>Closing efficiency drops on premium products; pricing is a mess</i>	<b>Salesforce CPQ:</b> A professional quoting engine for complex deals : no manual pricing errors, no 'guessing.'
Marketing	<i>Standard messaging fails; ads don't convert consistently</i>	<b>Predictive Personas:</b> AI-driven segmentation. Instead of one message, send 10 expert-level messages to 10 specific buyer types.
Customer Success	<i>Departments outgrow standard software; need specialist tools</i>	<b>Service Cloud Specialization:</b> Tiered support : general questions to bots; complex issues auto-routed to your most expensive Specialist engineers.
IT / Systems	<i>Paying for unused licenses and unprotected tech</i>	<b>License &amp; Security Audit:</b> Implement Shield for security plus an Optimizer to eliminate shelf-ware your specialized teams don't use.
Finance	<i>Losing track of cash flow and uncollected revenue</i>	<b>Revenue Intelligence:</b> A 'Money-Back' dashboard tracking every dollar of Slippage : over-discounting and uncollected revenue.

#### ★ BIG WIN

### The Expert Excellence Dashboard

*The President/Chairman needs to see Departmental Mastery : each leader winning their game.*

- **Yield per Specialist**

Revenue and output generated by your most specialized (expensive) hires.

- **Product Pruning Impact**

How much faster the team moves after removing Product Debt.

- **Recruitment Velocity**

Tracking the 30-day hire goal : how fast are you landing A-level talent?

#### MY MAP FOR STAGE 8

You've hit the 'Knowledge Wall.' Your team still looks to you for answers they should have. My Map for Stage 8 Specializes your Salesforce : move off standard tools onto high-performance modules like CPQ and AI-Analytics, giving your new VPs Formula 1 tools to hit \$100M.

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## The Predictive Enterprise

ARR TARGET  
**\$100M+**TEAM  
**250 to 500 Employees**SF FOCUS  
**Predicting your next big move**

**How We'll Use Salesforce:** You've won the game you started, but you need a new game to keep growing. Your systems are massive and compliance has become a major hurdle. We use Salesforce to segment massive data sets and deploy AI to find the 'Next Big Thing' while keeping global operations secure.

### SALESFORCE PRESCRIPTION — THE BUILD

DEPARTMENT	THE PAIN	THE SALESFORCE BUILD
Strategy	<i>Not sure where the next big growth comes from</i>	<b>Einstein Discovery / CRM Analytics:</b> Deploy AI to analyze 5+ years of data and find hidden Micro-Niches or new product opportunities.
Product	<i>Current products are 'cash cows'; new stuff needed to grow</i>	<b>Multi-Org / Multi-Cloud Strategy:</b> Separate R&D products into their own Salesforce environments so they move fast without slowing the core business.
Marketing	<i>Brand and compliance become a major issue at scale</i>	<b>Marketing Cloud / Account Engagement:</b> Strict Brand Guardrails and automated compliance checks so global marketing stays legal across 100+ countries.
Sales	<i>Reps specialize in selling different products to different segments</i>	<b>Advanced Account Teams:</b> A complex 'Team Selling' model so Product Experts and Account Managers collaborate on one deal without crossing wires.
Customer Success	<i>Support is massive; needs specialized AI-driven solutions</i>	<b>AI Service Bots &amp; Omni-Channel:</b> Move 80% of support to intelligent bots. Route High-Value issues to human teams based on real-time sentiment analysis.
IT / Systems	<i>Need specialized tech architects for each major platform branch</i>	<b>Center of Excellence (CoE):</b> Build a dedicated Salesforce team : Architects, Developers, Admins : managing the platform as a core business asset.

#### ★ BIG WIN

### The Future-Proof Portfolio Dashboard

*The Board needs to see Portfolio Health : Old Reliable vs. New Growth bets.*

- **Innovation Revenue**

What % of this year's growth came from products launched in the last 12 months?

- **Global Compliance Score**

Real-time data privacy and brand compliance status across every region.

- **Market Penetration Depth**

AI-generated view showing how much room is left before you hit total market saturation.

#### MY MAP FOR STAGE 9

You've hit the summit of this roadmap. Your initial market is saturated. My Map for Stage 9 deploys Einstein AI and builds a Center of Excellence : turning your Salesforce data into a crystal ball that predicts your next \$100M opportunity before your competitors see it.

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YOU'VE GOT THE MAP.

# Ready to Build Your \$0 to \$100M CRM?

Every stage in this guide is a real system we've helped companies build. If you're ready to move from where you are today to where you need to be, we'll show you exactly how — step by step.

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