Simpliigence

Concierge Services

Concierge by Design bridges the gap between rigid project delivery and the fast-moving needs of growing organizations. It provides on-demand access to tactical execution, strategic guidance, and a commitment to AI readiness — By Design.

Some Challenges We've Heard

- Immature or fragmented Salesforce environments
- Inconsistent access to expert Salesforce resources
- Overwhelmed internal teams with no dedicated admin or strategist
- Difficulty responding to stakeholder requests outside of structured project scopes
- Frustration with slow turnaround times for small but critical enhancements
- A desire for strategic input alongside execution, especially during transitional phases (e.g. growth, restructuring, or hiring)

We Understand the Impact

When tactical needs and strategic gaps are not addressed promptly and iteratively:

- Data integrity suffers due to unresolved duplicates or field misuse
- Reporting becomes inconsistent or unreliable, undermining decision-making
- Opportunities for process improvement and automation are missed
- End users lose confidence in the system and adoption declines
- Time-sensitive requests remain stuck in backlog or delayed by rigid processes
- System limitations begin to shape business processes, instead of supporting them

Use Cases We've Helped With

Sales and Revenue Operations

- Integration with marketing tools
- Auto-population of key fields to support pipeline hygiene and reporting
- Segmentation logic to support outbound and territory planning
- Guided flows to streamline stage movement and data capture
- Tracking of specific deal types such as net-new versus expansion

Marketing and Lead Management

- Support for outbound exclusion logic and filtering
- Mapping of full-funnel metrics (MQL to SQL to Closed Won)
- Connection of campaign data to cost-per-lead or ROI reporting
- Setup of attribution fields for source, vendor, and channel tagging

Use Cases We've Helped With (continued)

Service and Support Operations

- Form and layout redesign for easier technician or agent input
- Streamlined creation of work orders or service plans
- Enhancements to asset tracking and service visibility
- Simplified admin workflows for scheduling and approvals

Executive and Reporting Functions

- Creation of strategic dashboards with filters by industry, segment, or region
- Capture of key lifecycle metrics to support forecasting and board reporting
- Setup of signature tracking and activity logs
- Alignment of reporting with investor or leadership expectations

Administration and System Maintenance

- Cleanup of duplicates and realignment of parent-child relationships
- Removal of legacy fields or outdated prompts
- Configuration of validation rules and field-level logic to reduce error rates
- UX/UI improvements to declutter record pages and reduce training time

Value Drivers and ROI Metrics

Velocity	Cost Savings	Team Model	Response Time
2-3 Days	60-75%	Fractional	Real-time
vs. 2-4 weeks	lower per enhancement	admin-strategist	not project windows

Velocity

Reduction in turnaround time for small enhancements from 2–4 weeks to 2–3 days. Ability to respond to business needs in real time, not just in project windows.

Strategic Alignment

Early architectural input prevents downstream rework during growth or system expansion. Alignment of Salesforce with business priorities before major changes (e.g. executive hires, M&A, or system transitions).

Cost Efficiency

60–75 percent lower cost per enhancement compared to traditional project scopes. Hourly block model reduces spend on change requests that would otherwise trigger SOWs. Avoided costs from rework or misaligned configurations.

User Experience and Adoption

Increases in platform adoption due to improved usability and faster enhancements. Cleaner layouts and simplified flows lead to more accurate data entry and fewer abandoned records.

Team Enablement

Reduces pressure on internal teams by absorbing tactical and strategic system work. Provides a fractional admin-strategist model at a fraction of full-time headcount cost. Builds a usable, documented foundation for future in-house hires.

Time to Insights

Executive teams gain visibility into key metrics sooner. Accurate segmentation and attribution data support better decision-making. Confidence in forecasting improves when reports reflect trusted, consistent data.

Flexible Options to Fit Your Goals

1. Pay-as-you-go
2. All-in Services (6–12 Month Partnership)