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Salesforce Fractional Architect

Methodology, Processes, & Deliverables

An outline of our methodology to the description, capabilities, & benefits to hiring a fractional/part-time Salesforce Architect.

Prepared By



Email: Sales@crmArchitects.AI

Phone: 303-324-2884



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INTRODUCTION

Welcome to "Salesforce Fractional Architect". This report encapsulates the benefits of hiring a fractional or part-time Salesforce Architect adding to your internal IT department including required qualifications, experience, capabilities, responsibilities, and cost savings.

Purpose of a Salesforce Fractional Architect

The primary objective is to understand the role requirements, complexities, & cost benefits to your business. Today, Salesforce architects are in high demand & retain deep knowledge & experience in the platform. Adding a fractional or part-time Salesforce Architect to your internal IT staff leads to productivity gains, user efficiencies while maintaining budgetary discipline. Finally, due to the dynamic nature of Salesforce, architects are essential to supporting your business with future road mapping and guidance ensuring long-term platform success..

Report Scope

The report highlights the following:

- Platform experience to look for when hiring
- Leadership, personality, & communication traits
- Monthly costs & time commitments
- Capabilities, responsibilities, & deliverables
- Future planning & road-mapping

“We went from an in-house Salesforce Solution Architect to a part-time contracted fractionalized architect and saved more than 50% without missing a beat.”

Mid-Market Hi-Tech Manufacturer



Role Description

1 Salesforce Knowledge & Experience

Salesforce Architects should have 8+ years platform experience, specific vertical industry knowledge, specific Salesforce Cloud Certifications, and familiarity with client related CRM, ERP ecosystems.

2 Communication & Leadership

Architects are inquisitive & investigative particularly around business processes, data, and metadata. Communication and leadership skills are absolutely necessity – asking the right questions and formulating the right solutions.

3 Capabilities & Responsibilities

Architects translate business processes into Salesforce functionalities. Focus is on utilizing Salesforce OOB (out of the box) features whenever possible and maximizing the investment in clouds and licenses.

4 Future Planning and Road Mapping

Architects digest the current Salesforce Org configuration with an eye on future enhancements such as AI enablement, strategic road-mapping, and cadence to ensure predictable budgetary planning & user benefits.

Role Summary

Salesforce Architects deliver active improvements & efficiencies to clients while recommending a roadmap for digital transformation enabling business leadership make data-driven decisions for the future.



Methodology

1 IT Systems and Salesforce Orgs

- Review all artifacts, documentation, and current architecture.
- Perform Salesforce Org scan
- Understand active platform integrations.

2 Salesforce Clouds & Licenses

- Review active Salesforce clouds, licenses, features, add-on products, and thresholds under contract.
- Audit user Salesforce adoption.

3 Data / Metadata Analysis

Analyze Managed Packages/Apps, Objects, Fields, Page Layouts, OWDs, Sharing Rules, Permission Sets, Integrations, Apex Classes/Triggers, Tech Debt & Legacy Customizations.

4 User Workshops

Conduct User workshops to understand external and Internal Business processes automations (Workflow Rules, Process Builders, & Flows).

Summary

Our Salesforce Architects digest your current IT landscape in relation to your Salesforce Org, meet with your users to understand their business processes, and make recommendations for improvements within your IT budgetary restrictions.



Case Study

Client:**High Tech Manufacturer****Solution Architect Goals**

- Join In-Flight Project Implementation Teams
- Validate Project Goals, Solutions, and Timelines
- Recommend Future Salesforce Functionality

Overview:

Client using a legacy, home-grown software solution for sales, customer service, and operations migrating to the Salesforce platform for >1,200 users. 3 project teams working on the migration needed solution guidance, validation, schedule coordination, and executive communications and confirmation.

**Results:**

- Provide leadership to project managers and development teams
- Align projects delivery schedules and team individual performances
- Implement additional project logging, tracking, and reporting
- Introduce new developer and tester accelerator tools
- Deliver weekly projects status presentation to executive stake holders
- Ensure projects actuals vs. project budget alignment
- Develop milestones, go-live, and post project managed support
- Enable future enhancements and back log improvements

Benefits

Experience + Knowledge = Trust

- Our architects learn your business, IT architecture and Salesforce platform to help grow your business long term.
- Supporting your IT teams builds trust and establishes strong relationships for future project implementations.
- Executive teams gain deep insight and updates on team performance, staffing levels, and upcoming needs.

ROI, Future Enhancements and AI-Enablement

- Analysis of your current Salesforce investment in clouds, licenses, and add-ons ensures maximum ROI.
- Legacy configurations and customizations are updated or retired in favor of the latest Salesforce features and functionalities.
- You maintain higher user adoption and facilitate new user training on your business processes.
- Architect support and guidance for your business transition to AI that delivers more value and success.

Conclusion

Thank you for your interest in our Salesforce Fractional Architect solution. Our methodology allows our clients to select the most experienced and knowledgeable architect the best aligns with your salesforce needs at the hours and allocation that fit your budget.

Finally, most Salesforce Orgs have endured thru the years a variety of configurations due to changes in the business, mergers & acquisitions, IT staff turnover, multiple service providers, etc. Thus, it is important that our architects highlight the key areas of success in each Salesforce Org (i.e. areas that are working properly) as well as make recommendations for future enhancements.

About



CRM Architects

CRM Architects: a US-based firm delivering Salesforce advisory and consulting services.

Our mission is to provide exceptional services and solutions that empower our clients. Our Architect-Led approach delivers comprehensive and expedited solutions at a much lower cost.

If you would like to speak with one of our Salesforce Architects please contact us:

Sales@crmArchitects.AI

Phone: 303-324-2884