

SUCCESS STORY

Guideline- Transforming Managed Services with Salesforce



CHALLENGE

Guideline, formerly known as SQAD, faced significant challenges with their Salesforce environment. Their instance was burdened with heavy technical debt, stemming from extensive customizations and non-value-added integrations that had been implemented over time. These customizations created bottlenecks that made scalability a pressing issue. Furthermore, the organization had a limited number of experienced Salesforce resources, further hampering their ability to address the issues effectively.

SOLUTIONS

StreamForce partnered with Guideline to address challenges within their Salesforce environment, focusing on Salesforce Revenue Cloud (CPQ) and providing a comprehensive range of services. Our approach began with a thorough health check and assessment, evaluating technical debt, outdated customizations, and potential bottlenecks. This evaluation helped identify key areas for improvement, forming the basis for our strategic solution. We streamlined and optimized the Salesforce system by removing redundant components and non-value-added integrations, simplifying the architecture for greater efficiency. We also implemented performance tuning measures to enhance scalability, addressing bottlenecks and ensuring the system could handle future growth. To ensure long-term sustainability, we introduced a proactive managed services model, focusing on preventive maintenance, regular updates, and strategic planning to reduce future technical debt and keep the platform running smoothly.



Guideline (formerly SQAD) is a company that specializes in advertising cost analysis and media planning software. Their platform provides comprehensive data on media costs, advertising expenditures, and audience metrics across various channels, including TV, radio, digital, and out-of-home. SQAD's tools help advertisers, agencies, and media buyers make informed decisions about budget allocation, media strategy, and campaign performance. By offering detailed insights and analytics, SQAD supports its clients in optimizing their advertising investments, improving efficiency, and maximizing the impact of their marketing efforts.

New York, NY
51-200 Employees
Technology

AT A GLANCE

Benefits

- Improved Stability and Efficiency
- Simplified System Architecture
- Enhanced Scalability and Long-term Sustainability

Challenges

- Technical Debt and Customization Challenges
- Scalability Issues
- Limited Salesforce Expertise: environment.

RESULTS

Our intervention resulted in a significant transformation of Guideline's Salesforce environment. By addressing technical debt, outdated customizations, and performance bottlenecks, we created a more stable and efficient Salesforce instance. We also streamlined the system architecture by eliminating redundant customizations and unnecessary components, which improved system efficiency and reduced the technical debt burden. This simplification made it easier to maintain the platform and allowed for smoother implementation of future updates.

Additionally, we enhanced the scalability of the Salesforce platform by implementing performance tuning measures, enabling it to effectively handle increased workloads while maintaining optimal performance and user satisfaction. To ensure long-term sustainability, we introduced a proactive managed services model, which focused on preventive maintenance and regular updates. This approach minimized future technical debt and costs, providing Guideline with continuous support and ensuring the long-term health and stability of their Salesforce environment.

This partnership with Guideline showcases how a proactive approach to addressing technical debt, simplifying system architecture, and optimizing performance can lead to a more sustainable, scalable, and efficient Salesforce environment. The successful outcome ensured that Guideline's Salesforce instance was not only stabilized but also future-proofed for continued growth.

SERVICE PROVIDED

- Health Check – Salesforce and Business Process
- Salesforce Advisory Services
- Salesforce CPQ (Revenue Cloud)
- Managed Services



“I am delighted to share my overwhelmingly positive experience working with Streamforce. Their contribution has been instrumental in achieving our objectives and fostering continuous growth. From the outset, their team exhibited unparalleled knowledge and dedication, proving to be an invaluable asset to our endeavors. Their unwavering support and collaborative approach significantly enhanced our ability to overcome challenges and seize opportunities. I am truly impressed by their professionalism, expertise, and commitment to excellence. I wholeheartedly recommend Streamforce to any prospective partners seeking a reliable and results-driven collaborator. Their impact on our success has been nothing short of remarkable.”

Maria Patino

Salesforce Project Manager

ABOUT STREAMFORCE SOLUTIONS

At StreamForce Solutions, we empower organizations to achieve growth through innovative technology solutions and expert guidance. Our team of digital transformation specialists has extensive experience across various sectors, including SaaS, High-tech, Private Equity, Education, Healthcare, Manufacturing, Finance, HR & Payroll, Retail, and Automotive.

We deliver tailored solutions to meet unique client challenges, focusing on value creation, business process standardization, systems optimization, and robust Go-to-Market tech stacks. Our services span engineering, cloud transformation, and product development, leveraging the latest technologies and frameworks, including Generative AI. We enable hyper-automation and provide strategic AI proof of concepts and labs to showcase value. With a global delivery model and over 120 certifications, we ensure top-quality service and support.

