



salesforce

Future-Proof Your Salesforce Investment with ideaHelix



Tools, Talent, and Transformation for Revenue Cloud and Salesforce Industries

The Reality Check

Your Salesforce investment was supposed to transform your business

instead, you're dealing with:

- Quote cycles that take hours instead of minutes
- Sales teams avoiding the system you invested heavily in
- Customizations that break with every update
- Performance issues that slow your entire revenue engine

Sound familiar? You're not alone.

Up to 70% of CRM implementations* fail to meet their original business objectives. But there's a proven path from frustration to transformation.

*Source: Salesforce



Your Strategic Partner

ideaHelix : Where Salesforce Expertise Meets Business Results

Silicon Valley-based Salesforce consulting partner and tools developer
We don't just implement Salesforce - we transform how you do business

Our Track Record:

- Hundreds of successful projects delivered by our experts
- 400+ certifications across our team of Industry specialists
- 50% lower project risk through purpose-built automation tools
- Built-in QA through 300+ automated best practice checks

What We Do:

- Identify and eliminate inefficiencies that are killing your performance
- Simplify and refactor workflows to accelerate time-to-value
- Automate data migrations to unlock innovation, while reducing risk



Our Focus Areas

Revenue Cloud

Transform Your Revenue Engine

- Streamline quote-to-cash processes from hours to minutes
- Simplify CPQ complexity that's frustrating your sales teams
- Migrate from legacy CPQ to RCA without business disruption

Salesforce Industries

Industry Specific Excellence

- Simplify complex product catalogs, accelerate time-to-market
- Redesign order flows to accelerate deal closure
- Migrate from managed package to core Salesforce efficiently

Agentforce & AI

Agents That Get Your Industry

- Industry-specific agents for Comms, Media, Energy & Utilities and more
- Automate sales processes, product catalogs, quoting, and service
- Deploy AI that enhances human capability rather than replacing it

Common Challenges We Solve

When Salesforce Implementations Need Expert Guidance

Over-Customized Organizations

"Our system is so customized, we can't upgrade without breaking everything"

→ Our rescue programs restore flexibility while preserving functionality

Product Catalog Nightmares

"Changing pricing or adding products is way too much effort"

→ We redesign catalogs and streamline order flow to improve speed to market and order accuracy

Migration to Core

"We're don't know how to do it and it seems too risky"

→ Our proven approach and automated tools eliminate months of manual work and human error

Performance Problems

"Our Salesforce org is just too slow, frustrating users"

→ We can optimize your Org for performance, reliability, and scalability

AI Setbacks

"We did an AI pilot, but it wasn't aligned our business"

→ We build industry-specific agents that actually deliver results



Our Game-Changing Automation Tools

Technology That Reduces Risk and Accelerates Success



Best Practice

- Identifies configuration issues before they become problems
- 300+ best practices based on real-world delivery experience
- Prevents costly mistakes that impact performance



Migration

- Automatically translates design- time product catalog elements
- Converts quotes, orders, contracts, subscriptions & assets in minutes, not months
- Eliminates manual work to reduce errors and delays



Test Automation

- Define comprehensive test scripts without complex coding
- Supports UI, API & APEX test cases for complete coverage
- Run and track test as part of your CI/CD pipeline with GitHub integration



Business Impact

60%
Faster delivery
timelines

50%
Reduction in
project risk

40%
Less manual
migration work



Customer Success Story



Regional Fiber Service Provider

Turbocharges its Revenue Engine

Communications Cloud program to reimagine the sales experience, streamline middle-office processes and accelerate time to market.

50%

Faster Quoting
& Contracting

60%

Faster Program
Delivery

80%

Less
Customization

"We chose ideaHelix for their deep industry and product expertise, their innovative tools, and their alignment with our hyper-focus on customer experience"

— Aubry Henkel, VP of IS, IT & PMO



Industry-Specific Expertise

We Speak Your Language

Communications

- Partner advisory board member, aligned with TMF standards
- Complex pricing models and product bundles
- B2B, B2C and partner experiences for sales and service
- Handover to Service Order Management and fulfillment

Media & Entertainment

- Ad sales, billing, rights and royalty management automation
- Subscriber management and content lifecycle orchestration
- Monetization flexibility to cater for emerging business models
- Consistent data and service across channels

Energy & Utilities

- Unified digital sales, service and field operations
- Automated quote-to-cash and contract management processes
- Customer onboarding and Self-service capabilities
- Bundling with communications and other new services

Why Industry Expertise Matters

Generic Salesforce implementations miss the nuances that make or break success in specialized industries.

Our team has delivered solutions for the specific challenges you face every day.

Industry-Specific Expertise

We Speak Your Language

High-Tech

- Reduce SKU sprawl, unify quote-to-cash and accelerate sales
- Streamlined product catalog and pricing with scalable CPQ
- Partner self-service tools for fast quoting, ordering, and fulfillment
- Integrated ERP for real-time accuracy across quote-to-cash workflows

Manufacturing

- Complex B2B quoting for configurable products and multi-tier pricing
- Integration with ERP for BOM generation and order orchestration
- Field service, warranty, and asset lifecycle management
- Dealer and distributor enablement across sales and service channels

Insurance

- Complex policy, billing, and claims across P&C, Life, and Group
- Seamless experiences for agents, brokers, and customers
- Support for usage-based, embedded, and bundled products
- Integrated with policy systems and compliance processes

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Ready to Transform Your Salesforce Investment?



Ready to unlock the full power of Salesforce?
We'll help you optimize, evolve, and future-proof
without the headaches.



Let's talk:
contact@ideaahelix.com