

Make *transformation* deliver

2026 | Services

Agile Delivery

CRM & Salesforce Service Definition



ABOUT CRM & SALESFORCE CASE STUDIES METHODOLOGY SOCIAL VALUES LET'S CONNECT

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ABOUT AGILE DELIVERY

We are a transformation partner
built to **protect investment** and
make change deliver.

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WHAT WE DO

Agile Delivery is a UK consultancy that helps leaders **gain confidence that transformation is **under control**.**

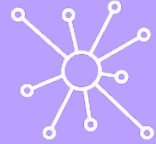
We work at the point where strategy meets delivery, bringing clarity to priorities, tightening governance, and stopping value leakage. The result is calmer, more focused programmes that deliver outcomes you can stand behind.



CRM & Salesforce



**CRM Roadmap
& Strategy**



**Integration &
Data Migration**



**Salesforce
Implementation
& Configuration**



**Training &
Adoption**



**Salesforce
Customisation &
Development**

CRM & Salesforce

Salesforce and CRM services help organisations design, implement and optimise CRM platforms. We provide CRM strategy, Salesforce configuration and custom development, data integration and migration, and user adoption support. Our approach delivers scalable, user-centred CRM solutions that improve insight, productivity, and customer engagement.

Features

1. Define CRM strategy aligned to business objectives and priorities.
2. Configure Salesforce to support end-to-end business processes.
3. Design scalable CRM data and information structures.
4. Build custom Salesforce components and automated workflows.
5. Integrate Salesforce securely with internal and external systems.
6. Migrate and cleanse legacy CRM data with minimal disruption.
7. Enable real-time reporting through dashboards and analytics.
8. Deliver role-based Salesforce training and adoption support.
9. Govern CRM delivery through structured project management.
10. Optimise platform performance, usability, and long-term scalability.

Benefits

1. Deliver a clear, business-aligned CRM strategy and roadmap.
2. Enable prioritisation of high-impact CRM initiatives and investments.
3. Improve user experience through tailored, intuitive CRM configurations.
4. Increase productivity through automation and streamlined user workflows.
5. Create a single, trusted view of customer data.
6. Reduce delivery and migration risk through structured implementation.
7. Accelerate decision-making with real-time reporting and insights.
8. Enable secure, scalable CRM platforms supporting future growth.
9. Drive faster adoption through role-based training and enablement.
10. Maximise CRM value through sustained user engagement and alignment.

CRM Roadmap & Strategy Workshops

CRM Roadmap & Strategy Workshops from Agile Project Delivery help organisations define a clear, business-aligned vision for CRM success. We facilitate structured, insight-driven sessions to assess current capabilities, identify strategic priorities, and co-create a phased roadmap. Our approach integrates stakeholder input, best practices, and delivery planning. The result is a focused, actionable strategy that drives CRM value and adoption.

Features

1. Assess current CRM capabilities and challenges
2. Align CRM strategy to business objectives
3. Identify high-impact use cases and opportunities
4. Facilitate stakeholder input through guided workshops
5. Define priorities across people, process, and platform
6. Co-create phased implementation roadmaps
7. Map dependencies and key enablers for success
8. Address data, integration, and user adoption needs
9. Validate approach using industry best practices
10. Support roadmap execution planning and next steps

Benefits

1. Define a clear, business-aligned CRM strategy
2. Deliver a phased, actionable CRM roadmap
3. Enable prioritisation of high-impact CRM initiatives
4. Align stakeholders around shared CRM objectives
5. Improve planning through structured workshop facilitation
6. Identify capability gaps and future-state requirements
7. Support CRM adoption with clear strategic direction
8. Strengthen alignment between business and technology teams
9. Accelerate decision-making with validated recommendations
10. Reduce delivery risk through upfront strategic clarity

Salesforce Implementation & Configuration

Salesforce Implementation & Configuration services from Agile Project Delivery help organisations deploy Salesforce quickly and effectively to meet business needs. We deliver tailored configurations, automate workflows, and integrate data across systems using a structured, value-driven approach. Our teams manage end-to-end setup, user training, and adoption support. The result is a scalable, user-friendly CRM that drives engagement, productivity, and growth.

Features

1. Configure Salesforce to match business processes
2. Automate workflows for improved operational efficiency
3. Customise objects, fields, and page layouts
4. Integrate Salesforce with internal and external systems
5. Migrate legacy CRM data with minimal disruption
6. Implement user profiles, roles, and access controls
7. Build dashboards and reports for real-time insights
8. Enable scalable, modular CRM architecture
9. Support user adoption through tailored training sessions
10. Provide end-to-end implementation project management

Benefits

1. Deliver a CRM aligned to business processes
2. Enable automation to reduce manual effort
3. Improve user experience through tailored configurations
4. Integrate data for a single customer view
5. Accelerate setup using structured implementation methods
6. Define roles and permissions for secure access
7. Support decision-making with real-time reporting tools
8. Increase productivity with streamlined user workflows
9. Drive adoption through targeted training and support
10. Ensure scalability with future-ready CRM architecture

Salesforce Customisation & Development

Salesforce Customisation & Development services from Agile Project Delivery help organisations tailor Salesforce to meet their unique operational and customer needs. We design and build custom components, automate processes, and extend platform functionality using scalable, value-driven methods. Our approach ensures technical flexibility without compromising usability. The result is a highly customised CRM that enhances productivity, alignment, and user engagement.

Features

1. Build custom objects, apps, and components
2. Automate processes using Flows and Apex triggers
3. Design scalable solutions tailored to business needs
4. Extend Salesforce functionality through custom development
5. Integrate third-party tools and internal systems
6. Optimise user interface for ease of use
7. Develop reusable components to support future growth
8. Align customisations with governance and security standards
9. Enhance platform performance through technical optimisation
10. Support agile delivery with iterative development cycles

Benefits

1. Deliver tailored solutions to meet business needs
2. Enable automation to streamline critical workflows
3. Improve user experience through intuitive interfaces
4. Extend functionality to support future growth
5. Accelerate delivery using agile development practices
6. Define secure, scalable custom development standards
7. Enhance integration across systems and platforms
8. Increase productivity through simplified user journeys
9. Support business change with flexible configurations
10. Optimise performance through efficient technical design

Salesforce Integration & Data Migration Services

Salesforce Integration & Data Migration Services from Agile Project Delivery help organisations unify systems and unlock the full value of their CRM. We implement secure, cost-effective integrations and manage end-to-end data migration using proven, scalable methods. Our approach ensures data integrity, minimal disruption, and full platform alignment. The result is a connected, high-performing Salesforce environment that supports growth and decision-making.

Features

1. Assess integration requirements and data sources
2. Design secure, scalable integration architectures
3. Migrate legacy CRM data with full integrity
4. Cleanse, map, and transform data for migration
5. Implement API-led and middleware-based integrations
6. Enable real-time data synchronisation across platforms
7. Minimise downtime through phased migration planning
8. Validate data accuracy through structured testing cycles
9. Support compliance with governance and security standards
10. Ensure end-to-end delivery with post-migration support

Benefits

1. Deliver seamless data flow across connected systems
2. Enable faster access to accurate customer insights
3. Reduce migration risk through structured planning
4. Improve data quality through cleansing and validation
5. Accelerate time-to-value with automated integrations
6. Support real-time decision-making with unified data
7. Define scalable integration frameworks for future growth
8. Ensure compliance with data governance standards
9. Minimise disruption through phased migration strategies
10. Strengthen CRM performance with clean, reliable data

Salesforce User Training & Adoption Programmes

Salesforce User Training & Adoption Programmes from Agile Project Delivery help organisations maximise the value of their CRM investment. We design and deliver tailored, role-based training supported by adoption strategies that embed best practices and user engagement. Our approach combines hands-on learning, change enablement, and continuous support. The result is confident users, higher productivity, and long-term Salesforce success.

Features

1. Design role-based Salesforce training programmes
2. Deliver tailored sessions for users and teams
3. Enable hands-on learning with live system practice
4. Support adoption with targeted change enablement
5. Build confidence through scenario-based exercises
6. Develop reference materials and quick-start guides
7. Track progress using adoption and usage metrics
8. Provide ongoing support through helpdesk and Q&A
9. Align training to business processes and goals
10. Improve productivity through user-centric enablement plans

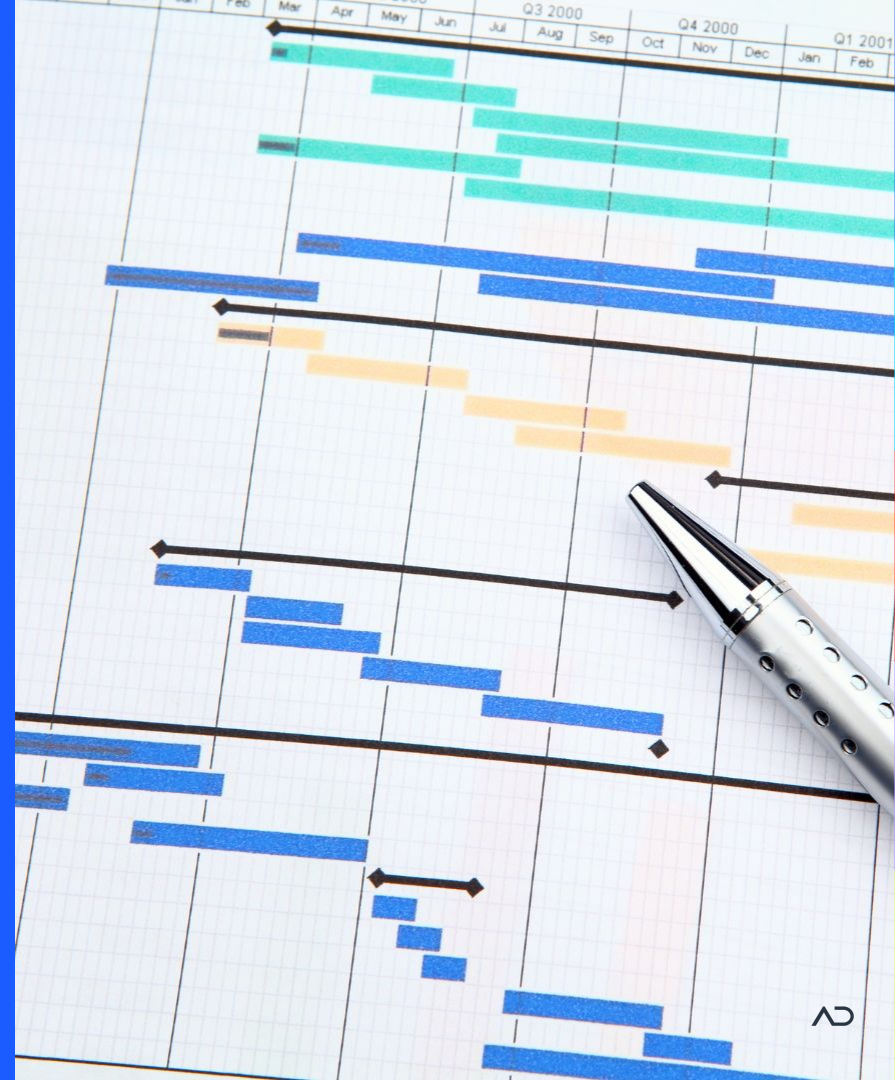
Benefits

1. Deliver confident, capable users from day one
2. Enable faster adoption through tailored training support
3. Improve productivity with role-specific learning paths
4. Increase system usage through structured enablement plans
5. Support change readiness across teams and functions
6. Define clear responsibilities for CRM engagement
7. Strengthen data quality through informed user input
8. Reduce support requests with proactive onboarding
9. Align user behaviour with business processes
10. Maximise CRM value through sustained user engagement

Accelerate Your Transformation

Case Studies

Agile Delivery



Measurement Manufacturing Company Tuned for Precision Service at Scale



Salesforce-based transformation of a global manufacturer's customer service and field service, consolidated to one org, integrated to ERP.

Problem

Sales and service operated on different orgs, so no single customer view and inconsistent processes. Service wasn't fully configured or joined up with the customer portal, and field service capability was limited in one region - slowing response, governance and scale.

Approach

I led the consolidation of service into a single Salesforce org, implementing Service Cloud, ServiceMax, Experience Cloud and MuleSoft. As part of the implementation, we standardised case-to-work-order processes, introduced Omni-Channel routing and entitlement-based SLAs, migrated field service, and enabled customer self-service via the portal.

Impact

Delivered a single view between sales and service, improving first-time resolution and time-to-close. Data-driven routing lifted SLA performance; portal self-service reduced case volume. 2,000 service and support users trained globally. With ERP-CPQ connected, agents raise service quotes from cases with accurate pricing, and quotes flow straight into finance.

2,000

End Users

5

Vendors

4

Salesforce Clouds

€4.5m

Investment

Accelerating Growth: Shifting Asset Finance Company into a Higher Gear with Salesforce



Salesforce-based transformation for a specialist asset financing business

Problem

The client's fragmented systems constrained growth, operational agility, and customer visibility. They sought a comprehensive Salesforce solution to unify sales, servicing, and fleet oversight, optimising workflows and driving scalable, data-driven transformation.

Approach

I led the design and deployment of Salesforce CRM, Supply Chain, Data Cloud, MuleSoft, and Automotive Cloud solutions. This modernised the client's specialist vehicle finance operations, centralising data, streamlining processes, and aligning diverse teams.

Impact

The business saw accelerated growth from integrated sales and servicing. Unified data flows enhanced visibility, standardised processes, and improved fleet management – transforming the client's approach to finance and cementing a scalable foundation for future expansion.

100

End Users

4

Business Areas

6

Salesforce Clouds

£2.5m

Investment

Cleared for Takeoff: Taking Customer Experience to New Heights at 2 Airports



Salesforce-powered digital marketing overhaul at 2 airports

Problem

2 airports needed a cohesive marketing and CRM strategy to unify customer data, drive effective personalisation, and boost cross-selling. Fragmented systems limited insight and engagement, prompting a holistic Salesforce transformation.

Approach

I directed Salesforce implementations across Marketing, Data, Sales, and Service Clouds. By centralising customer data, we enabled targeted campaigns, real-time segmentation, and streamlined service workflows, enhancing the Airport's overall digital presence.

Impact

This transformation elevated marketing ROI through personalised campaigns, delivering unified insights and higher cross-sell rates. An integrated Data Cloud enabled data-driven decisions at scale, consolidating the Airport's position as an innovative industry leader.

€300k

Investment

3

Systems Integrated

4

Newsletter Subscriptions

10

Segments Created

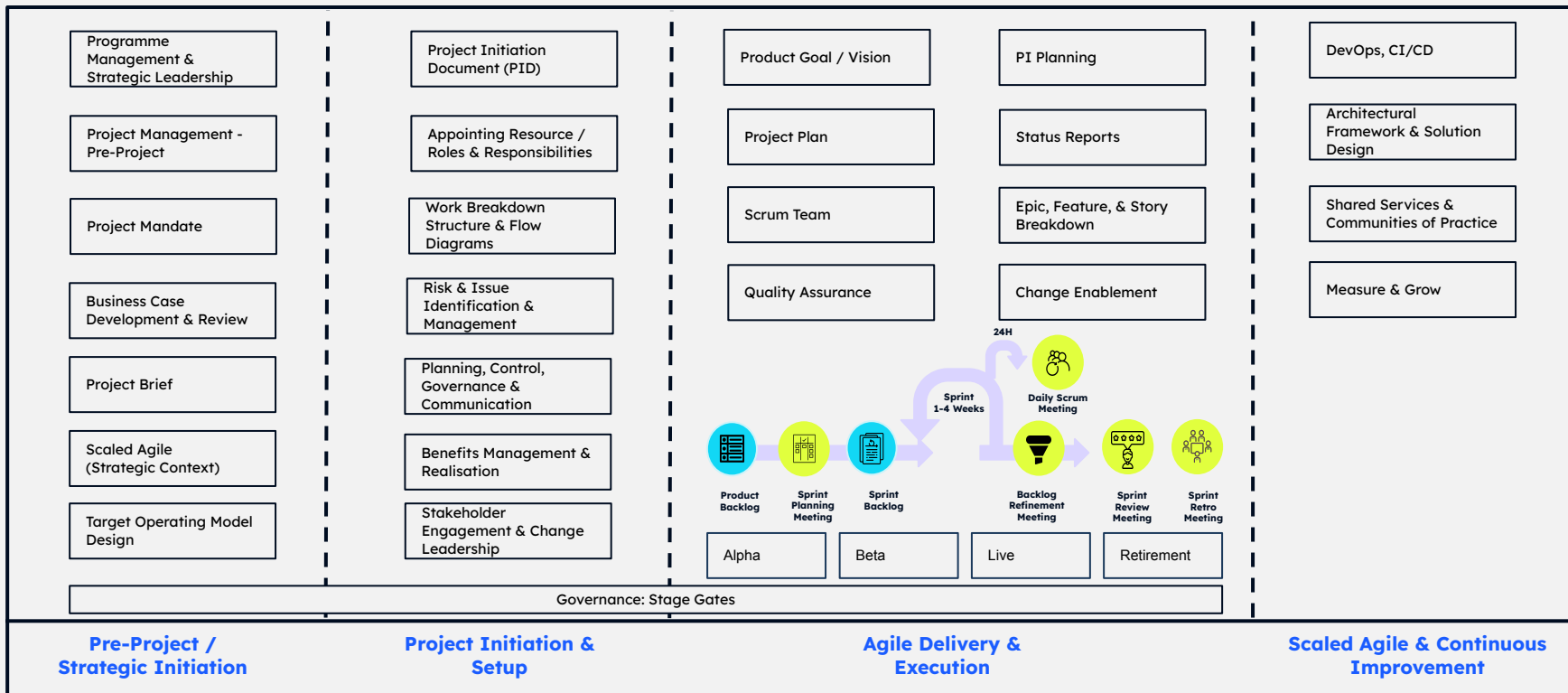
Accelerate Your Transformation

Agile Project Delivery's Methodology

Agile Delivery



DELIVERY METHODOLOGY



High-level vision, objectives, and feasibility.

Transforms strategic intent into a structured project.

Execution using the appropriate delivery methods when the groundwork has been laid.

To ensure alignment for larger initiatives with multiple teams.

Agile Delivery

Make *transformation* **deliver**

Social Values

Agile Delivery



We Build Community

Because meaningful engagement, shared knowledge, and accessible education shapes everything we do.

We Believe in the Power of Dialogue

Over the past five years, we've **hosted 16 Socratic Dialogues**—full-day explorations of essential human questions like **freedom, happiness, leadership, and responsibility**. Through these thoughtful conversations, we **enhance awareness**, cultivate **active listening** and **confident speaking**, and **inspire greater social engagement**.

We Champion Knowledge Sharing

In 2025 alone, we've **delivered three interactive sessions**: an overview of Agile and Scrum, a practical walkthrough of Jira, and foundational best practices for psychological safety in workshops. Together, these sessions have **empowered over 120 people**—making knowledge accessible, practical, and impactful.

We're Making Accessible Upskilling Accessible

In the past year, we've developed **five online courses**—covering PRINCE2, Agile and Scrum, Scaled Agile, mastering Jira, and successful facilitation skills. Designed to open doors into project and delivery roles, these courses have already **helped 45 people** build their careers in 2025 alone.

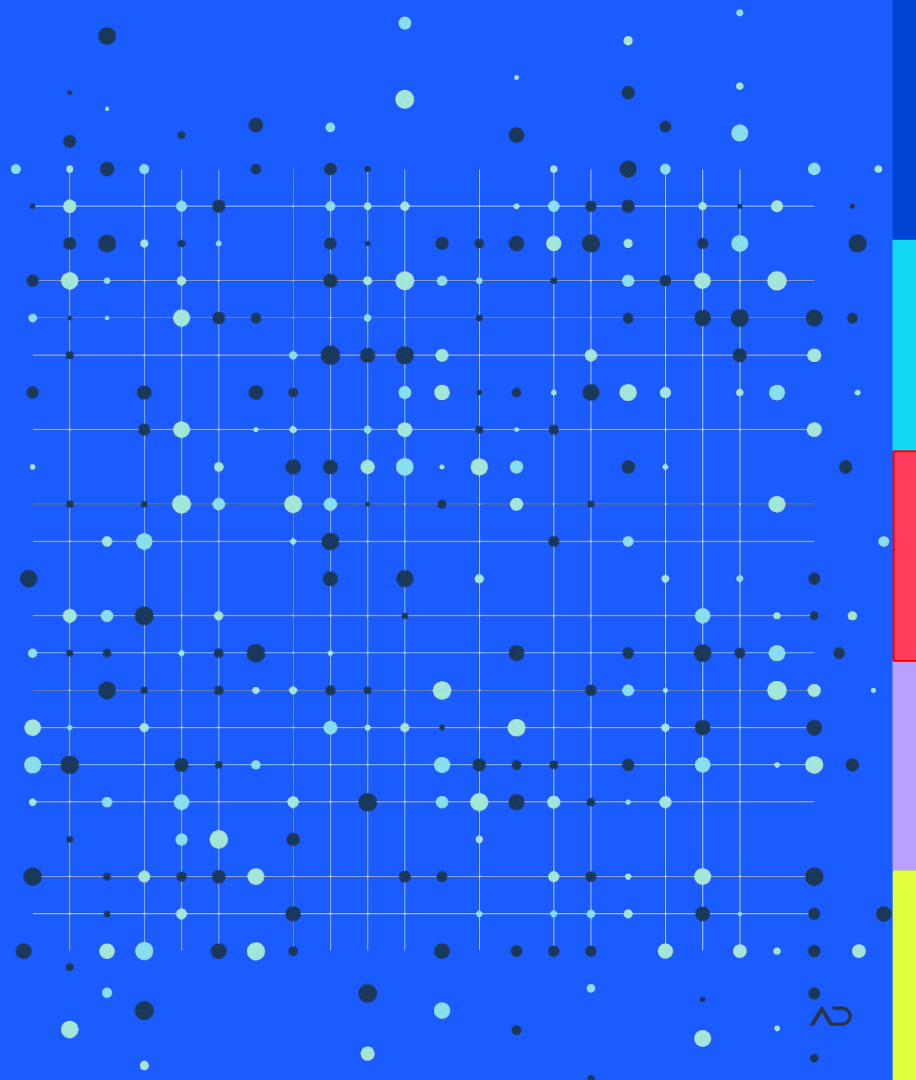
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Let's Connect

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Service Definition

Thank you for reading!

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