Enhancing Salesforce ROI for a Leading US-based Tire and Wheel Retailer

How Milestone Technologies assessed and optimized the Salesforce adoption of a national retailer, delivering a 15% ROI improvement aligned with their strategic goals.

The Background

The client, one of the largest independent tire and wheel retailers in the U.S., operates over 1,000 locations nationwide, offering a range of products like tires, wheels, sensors, lug nuts, and wiper blades, along with services such as tire installation and balancing. Founded in 1960, the company has grown significantly over the decades and engaged Milestone to enhance its Salesforce ROI.

The client was managing two separate Salesforce instances — the Enterprise edition and the Unlimited edition. The Enterprise edition supports Case Management and Marketing activities (leveraging Sales Cloud, Social Studio, and Reputation Studio), while the Unlimited edition is dedicated solely to Fleet Sales (using Sales Cloud).

The Objective

The goal was to assess the client's Salesforce investment and evaluate its alignment with their 5-year roadmap. The focus was on identifying opportunities to improve ROI through cost-efficient strategies and ensuring the Salesforce setup supported long-term scalability and business growth.

Key objectives included:

- Evaluate Salesforce adoption and its alignment with the client's long-term goals.
- Identify areas for optimizing ROI, especially within revenue models.
- Streamline processes to align Salesforce strategy with the organization's 5-year plan.

The Business Problem

The client was managing two Salesforce instances — one for marketing and case management, and another for fleet sales. They aimed to optimize their CRM across both instances. As they planned for expansion, they needed to assess the ROI of their Salesforce adoption and ensure alignment with their 5-year strategy.

With concerns about scalability, separate invoicing, and future ad-hoc requests, they sought a technology partner to provide architectural recommendations that would support long-term growth, enhance cost savings, and optimize the CRM setup across all business units.

The Milestone Solution

Milestone collaborated with the client, leveraging its Salesforce Center of Excellence (CoE) Architect, Delivery Program Manager, and Senior Business Systems Analyst to strategize initiatives, assess license needs, and set scaling objectives over a 5-year period. Working with senior executives, including the CIO, procurement teams, and program managers across key revenue streams like fleet management, appointment scheduling, and work order management, we developed a comprehensive cost model. This model detailed cost comparisons, potential savings, and critical decisions for each program.

Rather than relying solely on Salesforce's out-of-the-box features, our analysis identified where third-party plugins and middleware integration offered more cost-effective solutions than custom development. We also established clear roadmap expectations to ensure program alignment with the cost model.

Salesforce license calculations were conducted on a per-project basis using the Subscription and Enterprise License Agreement (SELA) model, ensuring the enterprise paid only for the resources used. The CoE Technical and Business Architects presented the final cost model and roadmap to the client's CIO, Business Division Directors, and Procurement team, guiding their strategic decisions. This included a cost comparison between the multi-org and single-org models to support store scaling and ensure all roadmap projects stayed on track, with no delays in timelines.

Key highlights of the solution include:

- **Strategic collaboration** with the client's CIO, procurement teams, and key program managers.
- **Comprehensive cost model** detailing cost comparisons, savings, and critical decisions across multiple programs.
- **Analysis of third-party plugins** and middleware integration as cost-effective alternatives to custom Salesforce development.
- **Per-project Salesforce license calculations** based on the SELA model to ensure cost-efficiency.
- **Roadmap expectations** aligned with the cost model to keep projects on track without delays.
- **Presentation of final recommendations** to senior leadership, including a comparison of multi-org vs. single-org models to support future scaling and cost savings.

The Result

Milestone delivered a two-year cost savings projection and identified a potential 15% ROI gain based on the proposed cost model. By consolidating the multiple Salesforce organizations into a single instance, the client was able to enhance scalability, reduce costs, and align its CRM setup with long-term business goals.

Key outcomes included:

- Projected 15% ROI gain within the proposed cost model.
- Alignment of Salesforce strategy with long-term scalability needs.
- Opportunity for further cost savings by consolidating orgs.

Key Learning

The project underscored the importance of aligning Salesforce investments with long-term business strategy. To achieve the projected 15% ROI gain, clear expectations were set with internal teams, and consolidating the orgs was identified as a key move for improving both efficiency and ROI. These insights were thoroughly reviewed and adopted by the client as part of their ongoing strategy.

The key learnings from this project highlight the importance of strategic alignment and effective collaboration to achieve measurable ROI improvements.

- Aligning Salesforce investments with the client's long-term strategy was critical for ROI improvement.
- Clear expectations were set with internal teams to ensure successful project execution.
- Consolidating Salesforce orgs was a key factor in improving efficiency and ROI.
- The projected 15% ROI gain was thoroughly evaluated and adopted by the client as part of their ongoing strategy.

Why Milestone

Milestone Technologies was selected for its deep expertise in Salesforce implementations and its proven track record of delivering strategic, scalable solutions tailored to unique business needs. As a Salesforce Center of Excellence (CoE) partner, Milestone brought a wealth of experience in CRM optimization, third-party integrations, and cost-efficient solutions.

Our ability to collaborate across all organizational levels — from CIOs to program managers — ensured that our recommendations were aligned with the client's long-term goals. Milestone's comprehensive approach to cost modeling, custom integrations, and strategic consulting positioned the client for sustained growth and increased ROI.

About Milestone

Milestone Technologies is a leading global IT services and digital solutions provider that collaborates with organizations worldwide to revolutionize their technology infrastructure and digital capabilities.

With a strong commitment to innovation and customer satisfaction, we empower businesses to accelerate their digital transformation journey and unlock new opportunities for growth and success.
By leveraging our extensive expertise in cutting-edge technologies, we provide companies with the agility and scalability needed to stay ahead in today's rapidly evolving digital landscape.

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