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DIGITAL & TECHNOLOGY SERVICES

The Salesforce Performance Gap: Why Smart Companies Get Disappointing Results (And 6 Ways to Fix It)

The Promise vs. Reality Challenge

Most organizations implement Salesforce with high expectations: better customer insights, streamlined processes and improved collaboration. Yet many find themselves with sophisticated systems that deliver underwhelming results. This gap between promise and performance is not just a technology issue. It's a fundamental business challenge.

Here's the truth:

Smart companies struggle with Salesforce not because the technology fails but because the connection between technology and business strategy breaks down. Recognizing this pattern, Coastal and Alvarez & Marsal formed a partnership that brings together technical expertise and business transformation capabilities. This analysis isn't just an overview of problems. It's a practical framework for organizations ready to turn their Salesforce investment into a genuine competitive edge.

Salesforce success depends less on the technology and more on how organizations implement and manage it.

Over the past year, Coastal surveyed more than 50 organizations about their Salesforce experiences. Their assessment revealed a pattern of common obstacles that prevent companies from realizing the full value of their CRM investments.

Smart companies struggle with Salesforce due to a disconnect between technology and business strategy, not because of the technology itself.





5 Key Barriers to Salesforce Success

01 THE PARTIAL IMPLEMENTATION PROBLEM

Most organizations use only a fraction of Salesforce's capabilities, typically just one or two products from the platform's ecosystem. This limited approach undermines the core advantage of an integrated system — connecting customer data across touchpoints.

When departments select disconnected tools based on individual preferences rather than organizational strategy, the result is higher costs and diminished returns. The value equation is simple: Broader implementation across functions means lower cost per module and greater return through data integration.

02 THE COMPLEXITY FREEZE

Over half of the surveyed organizations have identified clear improvement opportunities in their Salesforce systems but hesitate to implement them. The root cause? Fear of disrupting existing processes.

03 THE REACTIVE CYCLE

Over 60 percent of respondents report feeling overwhelmed by requests or stuck in a reactive cycle, making it difficult to plan and execute strategically. This reactive approach creates a troubling pattern where Salesforce becomes a collection of tactical solutions rather than a strategic asset.

Limited technical resources often lead to "shadow IT" within sales and marketing departments, diminishing trust in central IT support. When departments create their own solutions, the result is typically nonstrategic, break-fix work being done without considering broader implications for the organization.

04 THE DATA TRUST CHALLENGE

Perhaps most concerning, more than 50 percent of respondents don't trust their data within Salesforce. This fundamental issue undermines the very purpose of a CRM system.

The survey revealed that data mistrust typically stems from a lack of Master Data Management (MDM) methods and tools, as well as internal politics surrounding data ownership and governance. When data can't be trusted, the ability to track sales and measure performance becomes compromised, creating a cascade of challenges throughout the organization.

05 THE ADOPTION HURDLE

Adoption remains the most pervasive pain point, with over 90 percent of respondents struggling with user engagement. Despite significant investments in the platform, many organizations find themselves with sophisticated systems that users simply aren't embracing.

The research highlights a critical gap: many implementations focus on system functionality rather than user experience. Training programs often emphasize mechanics (how to click) rather than value (why to use). When users don't understand how the system helps them succeed, adoption suffers regardless of the platform's capabilities.

Training programs often emphasize mechanics (how to click) rather than value (why to use). Without understanding of the system benefits, adoption suffers.



From Diagnosis to Solution: A Strategic Framework

These challenges, while significant, can be overcome with a systematic approach. Based on their experience helping organizations across industries, Coastal and Alvarez & Marsal have developed a framework to transform Salesforce from an underutilized tool into a business catalyst.

01 STRATEGIC ALIGNMENT: SETTING DIRECTION

Successful Salesforce implementations start with clear business objectives, not technical features. This approach includes:

- **Business-First Planning:** Defining how Salesforce supports specific growth strategies, customer experience goals and operational targets
- **Cross-Functional Governance:** Creating decision-making structures that balance departmental needs with enterprise goals
- **Capability Assessment:** Evaluating current usage patterns to identify high-impact expansion opportunities

02 TECHNICAL FOUNDATION: BUILDING FOR GROWTH

The technical architecture must support rather than constrain business agility:

- **Simplification:** Reducing unnecessary complexity by consolidating instances and eliminating redundant customizations
- **Integration Design:** Creating seamless connections between Salesforce and other critical business systems
- **User-Centered Interfaces:** Designing screens and workflows that mirror how people actually work

03 DATA STRATEGY: BUILDING CONFIDENCE

Trustworthy data requires intentional governance:

- **Data Standards:** Establishing clear rules for how customer information is created, updated and maintained
- **Quality Management:** Implementing automated tools to identify and correct data problems before they spread
- **Ownership Clarity:** Defining who is responsible for different data elements to ensure accountability

04 CHANGE LEADERSHIP: ENGAGING USERS

Technology rollouts are fundamentally about people:

- **Stakeholder Alignment:** Ensuring leaders across functions understand and support the initiative
- **Adoption Planning:** Developing training and communication that emphasizes business benefits, not just technical features
- **Success Measurement:** Tracking usage patterns and addressing barriers before they become entrenched

05 CONTINUOUS IMPROVEMENT: SUSTAINING VALUE

CRM excellence requires ongoing attention:

- **Proactive Support:** Providing expertise to address issues quickly and implement enhancements
- **Innovation Focus:** Incorporating new capabilities like AI and automation to solve emerging business needs
- **Value Tracking:** Measuring specific business outcomes to demonstrate return on investment

06 RECOVERY: TURNING AROUND STRUGGLING IMPLEMENTATIONS

When systems have veered off course, targeted intervention can restore value:

- **Implementation Reset:** Realigning underperforming systems with current business needs
- **Technical Streamlining:** Removing accumulated customizations that create complexity without adding value
- **Crisis Stabilization:** Quickly addressing critical issues with data accuracy, system performance or user access



Bridging the Opportunity Gap

The Coastal Compass assessment reveals a fundamental truth: Salesforce success depends less on the technology itself and more on how organizations implement and manage it. The challenges identified — partial implementation, technical complexity, reactive management, data mistrust and user resistance — are primarily organizational issues, not technical limitations.

What separates high-performing Salesforce implementations from struggling ones isn't budget or technical sophistication — it's strategic clarity, governance discipline and user engagement. Organizations that approach CRM as a business initiative rather than an IT project consistently achieve better results.

This analysis is based on research conducted by Coastal, surveying over 50 organizations across corporate, private equity and public sectors about their Salesforce implementations and challenges.

Coastal and Alvarez & Marsal have combined their expertise to help organizations address these challenges through practical approaches like the **True North Roadmap**, which identifies high-impact opportunities, and **Waves**, Coastal's managed service offering that provides ongoing optimization.

The path to Salesforce excellence isn't about chasing the latest features or building the most complex automation. It's about aligning technology with clear business goals, establishing effective governance, ensuring data quality, engaging users and measuring outcomes. With this disciplined approach, organizations can transform their CRM investment from a source of frustration into a genuine competitive advantage.

KEY CONTACTS



Peter Koltis
Managing Director
pkoltis@alvarezandmarsal.com



Mark Burkhead
Waves Practice Director at Coastal
mark.burkhead@coastal.us

ABOUT ALVAREZ & MARSAL

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