

A DEVSINC DIAGNOSTIC

The Salesforce Maturity Model

What Every Stage Is Actually Costing You

Most enterprises don't know their real Salesforce maturity stage, and the cost compounds every quarter. Find out in 10 minutes.



From scattered signals to a system that compounds on its own.

How This Works

As a Salesforce implementation partner, we see the same pattern across growing enterprises: real investment, real intent, but progress that's stalled somewhere nobody's actually diagnosed. This guide exists to make that stall visible, before it gets more expensive to fix.

Five stages. One clear diagnostic. Ten minutes to see exactly where you stand.

WHY IT MATTERS

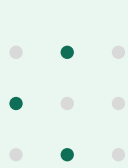
- • • **Invisible Until It's Not**
- • •
- • • Underperformance often stays hidden until it shows up as a missed forecast.

- • • **The Gap Compounds**
- • •
- • • Standing still isn't neutral, the gap to later stages widens every quarter.

- • • **Fix First, Not Everything**
- • •
- • • Knowing your stage tells you what to fix first, not everything at once.

Which Stage Is Quietly Costing You the Most?

Most organizations show signs of two stages at once. Your true stage is your weakest signal, not your strongest.



1 Flying Blind



Decisions made without real visibility

Watch for: Sales Cloud and Service Cloud running with no shared data model, forecasts nobody trusts



2 Running to Stand Still



Paying for Salesforce without the payoff

Watch for: Reports still built in Excel, Sales Cloud and Service Cloud implemented but never connected



3 Seeing Clearly

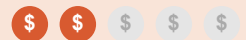


Healthy baseline, most think they are here

Watch for: Data Cloud or Einstein licenses sitting active, unused



4 Outpacing the Field

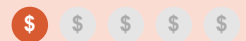


AI doing real work

Watch for: Agentforce handles routine decisions solo across Service or Sales Cloud



5 Compounding the Lead

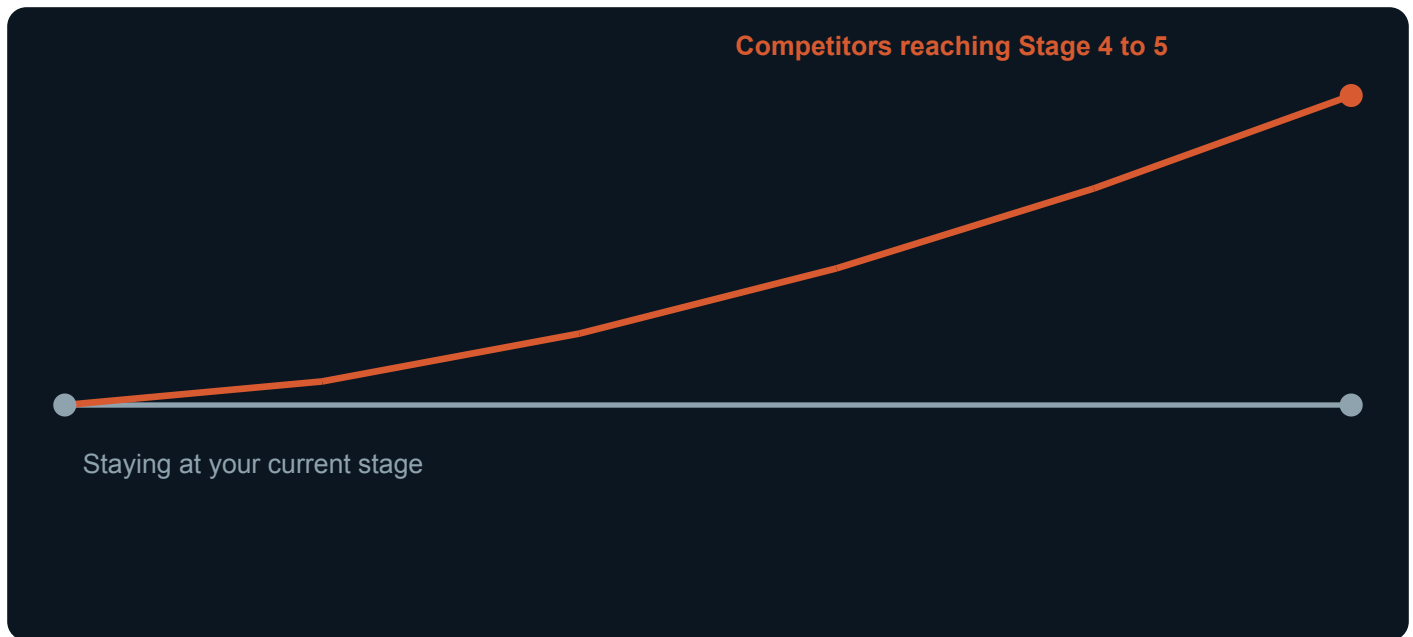


An edge that grows on its own

Watch for: System improves without a new project

The Gap Is Widening, Not Standing Still

Staying at Stage 2 or 3 does not mean staying safe, especially once you are scaling fast past Series B. The distance to Stage 4 and 5 grows every quarter a competitor gets there first.



Stage 1 to Stage 2

Pipeline discipline in Sales Cloud, one trusted source of truth. Mostly behavioral, not technical.

Stage 2 to Stage 3

Connecting Sales Cloud, Service Cloud, and Experience Cloud. Where most orgs quietly stall for years.

Stage 3 to Stage 4

Ground Einstein and Agentforce in one real workflow, not a pilot.

Stage 4 to Stage 5

No new build required, just measuring outcomes and expanding on repeat.

The longer a stage lasts, the more expensive catching up becomes, not from new technology, but compounding operational debt.

What's Actually Being Measured

Five stages tell you where you stand overall. That answer is really decided by three separate scores, and most leaders only know one of them.

Data & Visibility

Can leadership actually trust what the system tells them.



Sales Cloud



Data Cloud

Automation & AI Usage

Is your Salesforce AI doing real work, or just licensed and idle.



Einstein



Agentforce

Adoption & Process Discipline

Does the org run this system, or does it run on one person.



Service Cloud



Experience Cloud

6 short questions follow, 2 per area. Answer honestly, then score yourself on the page after.

The 6 Questions

Score each 1 to 5. Anchors shown for low, mid, and high practice.

DATA & VISIBILITY

Q1. How reliable are your forecasts?

1 Nobody trusts them · 3 Trusted at team level · 5 Trusted and AI validated

Q2. How much do you trust the dashboards leadership sees?

1 Rebuilt manually every time · 3 Mostly, with gaps · 5 Flags issues on its own

AUTOMATION & AI USAGE

Q3. How are Einstein, Agentforce, or Data Cloud used today?

1 Not licensed or unused · 3 Piloted in one use case · 5 Expanding on its own

Q4. When a routine customer request comes in, what happens?

1 A human handles it manually · 3 Partial automation · 5 Agents resolve and improve

ADOPTION & PROCESS DISCIPLINE

Q5. If your Salesforce admin left tomorrow, what would happen?

1 Everything breaks in days · 3 We'd be fine for months · 5 System is self sustaining

Q6. How often do you revisit and improve your Salesforce setup?

1 Never, set up once · 3 Roughly once a year · 5 Continuously

Each question follows this same 1 to 5 format, worst to best practice.

Score Yourself

Add your two scores within each section, then divide by 2 to get that area's average.



Data & Visibility

$(Q1-Q2) \div 2 = \underline{\hspace{2cm}}$



Automation & AI Usage

$(Q3-Q4) \div 2 = \underline{\hspace{2cm}}$



Adoption & Process Discipline

$(Q5-Q6) \div 2 = \underline{\hspace{2cm}}$

*Your lowest score is your real stage, not your average, and not your highest.
That's the one to fix first.*

Want a Second Opinion on Your Score?

You've just scored yourself. Here's the honest catch: most leaders score their best area without realizing it, and the real number is usually the one they didn't expect.

Send us your 3 scores and we'll tell you plainly what they mean, and what fixing your weakest one would actually take.

[Visit Devsinc Salesforce](#)

The One Move That Matters

Now that you know your weakest area, here's the one fix that matters most for it, not a 10 point roadmap.

1**Fix Your Data**

Nothing downstream works without it, starting with Sales Cloud.

2**Connect Clouds**

Sales Cloud, Service Cloud, and Experience Cloud, the most common cause of underperformance.

3**Turn On AI, Narrow**

One Agentforce workflow inside Sales or Service Cloud, do not wait for perfect.

4**Measure Outcomes**

Business terms, not activity.

5**Protect What Works**

Audit guardrails and data regularly across every connected cloud.

*You've just diagnosed yourself.
That's the hard part.*



BY THE NUMBERS

Trusted by Enterprises to Make Salesforce Deliver.

50+

Salesforce projects delivered

30+

Certified Salesforce experts

15+

Years of experience

4.8★

Average AppExchange rating

ABOUT DEVSINC

Devsinc is a global technology partner partnering with enterprises across North America, the UAE, and the wider MENA region to build, scale, and transform through enterprise application engineering, AI and data solutions, technology advisory, product development, and digital transformation.

With over 15 years of experience, more than 3,000 successful projects delivered, and over 230 active clients across 23 countries, we combine proven execution with deep technical expertise. As a certified Salesforce partner, we bring platform excellence together with world class engineering talent while taking an AI centric approach to every engagement, helping enterprises identify where AI can create meaningful business value and develop the systems needed to realise it. Our aim continues to be helping more enterprises grow further and faster, with AI at the core of that journey.

Let's Talk



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