ALLIED BizTech SOLUTIONS

FIELD GUIDE · 2026

Rebuild the sales ops stack yourself. *The plan we follow.*

For B2B sales teams of 50 to 500 seats who pay Sales Cloud, Outreach, Gong and Apollo by the seat, and want one workspace on one customer record, on their own accounts.

- → Is it worth it, at your size
- → What to rebuild and what to drop
- → One foundation, four modules
- → Migration and go-live checklists
- → One customer record
- → An 18-week build plan
- → Deliverability and the renewal date
- → Where teams get stuck

01 · IS IT WORTH IT

Four tools bill per seat. *A rebuild bills for use.*

Sales Cloud, Outreach and Gong charge for every rep, Apollo per seat or per record, and each adds a line with every hire. A rebuild replaces all four with one Postgres, Twilio and AWS SES for calls and email, Whisper and Claude for call analysis, and data bought for the segments your reps work.

TEAM	FOUR TOOLS A YEAR	REBUILT: YEAR ONE / AFTER	SAVED IN YEAR ONE
25 reps · 15 SDRs · 25 with call intelligence	~$280,000	~$115,900 / $36,000	~$164,100
100 reps · 50 SDRs · 50 with call intelligence	~$624,000	~$149,900 / $70,000	~$474,100
300 reps · 150 SDRs · 200 with call intelligence	~$2,000,000	~$347,400 / $168,000	~$1,652,600

Tool prices are their public list prices. "Rebuilt" is direct billing for Postgres, Twilio, SES, Whisper, Claude and data, plus hosting and maintenance ($22K + $14K, $46K + $24K and $120K + $48K a year), plus our fixed build price: $79,900 for all four modules, $179,400 (the top of the $120,700–$179,400 scale tier) from 300 reps. If your own team builds it, put your engineering cost in that place.

THE RULE OF THUMB

At 25 reps, year one already saves ~$164K. **At 100 reps, the rebuild saves ~$474K in year one and ~$1.58M over three years, and pays back in about two months.** At 200 reps on Einstein 1 and Gong Premium, year one crosses $1.5M.

Who you need

- **Senior full-stack engineers** at home with Postgres, row-level security, the Salesforce REST API, Twilio, email authentication and an LLM API: enough of them to build one module while the last one is in pilot. Our team ships all four in 14–18 weeks.
- **Your Salesforce admin and RevOps lead**, a few hours a week: the objects, roles, reports and sequences that matter, and the pilot teams.
- **An owner after launch**: upgrades, access reviews, sender reputation, integrations and the forecast.

02 · SCOPE

Four modules, one workspace. *Drop the rest.*

Each tool ships hundreds of features; a sales team uses a fraction of each, every day. Those are the project, on one record and one screen. On Salesloft and Chorus instead of Outreach and Gong? Same architecture.

REBUILD ONE FOR ONE

- **CRM** (Sales Cloud): leads, contacts, accounts, opportunities, custom fields; pipeline, forecast and the reports leadership reads; workflow, approvals, routing
- **Sales engagement** (Outreach): sequences, click-to-dial on Twilio, AI-drafted replies, tracking, reply detection
- **Conversation intelligence** (Gong): recording, Whisper transcripts, Claude insights, coaching, deal warnings
- **Sales data** (Apollo, ZoomInfo): targeted enrichment from Clay-class sources, verification, lists
- **A Salesforce-compatible API**: Marketo, ZoomInfo and your other tools unchanged
- **Slack and Teams** alerts, Outlook and Gmail tracking, calendar booking
- **SSO, SCIM**, one role model, one audit log

REBUILD, SIMPLER

- **Einstein AI**: Anthropic or OpenAI direct, plus custom scoring
- **AppExchange**: the apps you use, as direct integrations
- **LinkedIn**: a tracked manual task, no auto-actions
- **Next-best-action**: rules, not proprietary ML

DROP ON PURPOSE

- **Intent data**: Bombora or 6sense direct
- **Clari and CPQ**: an add-on module, or PandaDoc
- **Service Cloud, Pardot**: separate rebuilds

ADD WHAT PER-SEAT PRICING DISCOURAGES

- New reps at no seat fee
- Call, email, meeting and deal in one query
- New reps ramp in 1–2 weeks on a workspace built to your sales motion

One record. *Integrations untouched.*

Each tool wraps a commodity primitive. Build all four on one Postgres, behind one workspace and a Salesforce-compatible API, and the tools you keep never notice the change.

LAYER 1 · REPS USE

One workspace

- Accounts, contacts, deals
- Pipeline and forecast
- Sequences, tasks, dialer
- Call library, clips, coaching
- Lookup and enrichment
- Slack, Outlook, Gmail

LAYER 2 · ENGINE

Shared services

- Workflow, approvals, routing
- Sequence engine on a job queue
- Transcription and insight jobs
- Enrichment with provenance
- Daily pipeline snapshots
- Audit log of every change

LAYER 3 · YOU RUN

The foundation

- **Postgres**: one customer record
- **Salesforce-compatible** API
- **Twilio**: voice, recordings
- **AWS SES**: sequence email
- **Whisper** and **Claude**
- **S3**: recordings, files

Decisions to make in week one

DECISION	OUR DEFAULT	WHY
Hosting	Your AWS account	Your records, calls and reputation
Record	One Postgres, all four modules	Calls and emails land on it, no sync
IDs	Salesforce's IDs and field API names	Integrations resolve, no mapping table
API	The endpoints your integrations call	Log a week of traffic; build to that
Email	SES, dedicated IPs, a domain per SDR	One bad list never hurts another rep
Access	Your SSO, SCIM, row-level security	One set of rules for UI, API, modules

Compliance: an unsubscribe in every email, honoured across every sequence; call-recording consent where the law asks for it; a lawful basis recorded for EU and UK contacts. Build all three into the foundation.

One customer record. *Four modules write to it.*

In the vendor stack, four tools each keep a copy of the customer and sync them. In the rebuild there is one. Model these tables before any screen, and keep each vendor's ID on every imported row, so imports can run twice and every record traces back to its source.

TABLE	KEY COLUMNS
`accounts`	id, sfdc_id, domain, name, parent_id, owner_id, territory_id; custom fields as typed columns
`contacts`, `leads`	id, sfdc_id, outreach_id, apollo_id, account_id, email, phone, title, owner_id, status, timezone
`opportunities`	id, sfdc_id, account_id, owner_id, stage, probability, amount, close_date, forecast_category
`activities`	id, type (email, call, meeting, task), contact_id, opportunity_id, owner_id, module, at
`sequences`, `enrollments`	steps (jsonb); contact_id, rep_id, step, next_due_at, state (active, paused, replied, finished)
`calls`, `insights`	contact, opportunity, gong_id, twilio_sid, recording_key, transcript; insight type, text, start_ms, prompt_version
`facts`	entity, entity_id, field, value, source, fetched_at: where every enriched value came from
`suppressions`	email or domain, reason (unsubscribe, bounce, complaint, do not contact), at
`users`, `roles`, `shares`	user, role hierarchy, territory; record access by role, team and territory
`pipeline_snapshots`, `audit_log`	opportunity state every day; every field change with user and source (UI, API, module)

TWO RULES THAT SAVE A REBUILD

Every touch is an activity on the same record: an email sent, a call recorded and a meeting booked land as rows the CRM, the forecast and the call review all read, with no sync between them. **A rep's value beats any source**: enrichment fills empty or stale fields only, and one suppression stops every sequence at once.

Eighteen weeks, *four pilots, one cutover.*

This is the order we build in: lowest risk first. The CRM and its compatible API come first, so the tools you keep work from day one. Each module then runs a four-week pilot with real reps while the next one is built.

WEEKS	BUILD	DONE WHEN
1–2	**Foundation and export.** All four tools inventoried, with their renewal dates. The schema; SSO, SCIM, roles, the audit log. Salesforce, Outreach, Gong and Apollo exported to staging with their IDs. Sending domains authenticated; warm-up starts.	Counts in staging match all four tools
3–6	**CRM and the compatible API.** The workspace, access, workflow, pipeline, daily snapshots, the saved reports. The API, built to a week of logged traffic.	Marketo and ZoomInfo sync in staging with no config change
7–9	**Sales engagement.** Sequences, SES per mailbox, the Twilio dialer, AI drafts, every touch an activity. *Pilot from week 7: one sales team on the CRM.*	The pilot team's pipeline matches Salesforce's
10–12	**Conversation intelligence.** Recording webhooks, Whisper, Claude insights on the opportunity, coaching. *Pilot from week 10: SDRs on sequences, on warmed domains.*	A test prospect walks a sequence and stops on reply
13–14	**Sales data.** Targeted sources, verification, provenance, enrichment on lead creation. *Pilot from week 13: reps on call insights.*	A new lead arrives verified and enriched
15–18	**Rehearse and cut over.** *Pilot from week 15: reps on enrichment.* A full dry run, training recorded, a delta export from all four tools, then every rep in one workspace.	Pipeline, forecast and access agree to the dollar

THE CUTOVER

Every rep moves at once, into one workspace. Pause every Outreach sequence and switch off Gong's recorder at that moment, so no prospect gets two emails and no call records twice. Keep each tool **read-only until its renewal date**, then cancel.

One record, inboxes you keep, *a date you control.*

Four modules on one Postgres is standard engineering. Three things decide the rebuild: one customer record that four tools used to keep apart, email that lands from your own domains, and a cutover that lands on the renewal date.

One customer record

- **Match before you insert.** Accounts by domain, people by email. The Salesforce ID wins; the Outreach, Gong and Apollo IDs sit beside it. Merge duplicates in staging, before a pilot sees them.
- **Load in order.** Users, roles and picklists; accounts; contacts and leads; opportunities; then activities from all four tools, each on its contact and deal.
- **Prove access on the record.** For sample users in every role, export what each sees in Salesforce and make that your test. Row-level security makes the API, the call library and the sequencer obey it too.

Inboxes you keep

- **Authenticate every sending domain** with SPF, DKIM and DMARC: one per SDR, never your main company domain.
- **Warm up over 2–4 weeks**, from week one, so it finishes before the engagement pilot. Sending at full volume on day one lands in spam.
- **Stop at the first bad signal.** Hard bounces, complaints and opt-outs stop every sequence at once; every enriched address is verified before it enrolls.

The cutover at renewal

- **Four tools, four renewal dates.** List them in week one. Salesforce, the biggest bill, sets the cutover date; the others end at their own renewals.
- **Pilot until the numbers match.** Pipeline, forecast and access, compared daily and signed off by your RevOps lead.
- **Renewal later than week 18?** Run both side by side until it. Nobody is in a hurry.

Move it, launch it, *run it.*

Migration

- ☐ Export twice: everything in week one, the changes since at cutover
- ☐ Keep Salesforce's ID on every row, the other tools' IDs beside it
- ☐ Create users, roles and picklists before records
- ☐ Load accounts, contacts, deals, then activities from all four tools
- ☐ Carry over enrollment state, so no prospect restarts a sequence
- ☐ Import opt-outs and bounces as suppressions before anything sends
- ☐ Bring recordings and transcripts, each on its deal
- ☐ Bring every list with its source and date

Go-live

- ☐ Every integration re-pointed and syncing
- ☐ Reps signing in through your SSO
- ☐ The access test passing for every role
- ☐ Domains warmed; seed tests in the primary tab
- ☐ Outreach sequences paused; Gong's recorder off
- ☐ Backups proven by a restore
- ☐ Rollback ready until each renewal

Running it

- ☐ **Always on:** uptime, sync, send-queue and bounce alerts; security patches
- ☐ **Weekly:** deliverability per domain, reply rate per sequence, the integration sync report
- ☐ **Monthly:** upgrades, a report reconciliation, an insight and prompt review
- ☐ **Quarterly:** an access review; Twilio, SES, AI and data costs against the four bills you replaced
- ☐ **Yearly:** a restore drill

Who owns it

Name one person before launch, usually the Salesforce admin you already have. The forecast your board sees and your company's name in prospects' inboxes both run on this system; someone has to act when a number looks wrong or a domain's bounce rate climbs.

Five ways a rebuild *stalls.*

1. Four rebuilds instead of one

Four separate projects mean four systems syncing the same customer, four UIs, four logins and four cutovers: about 30 weeks run in sequence. One record and one workspace ship all four in 14–18.

2. Switching vendors and calling it a saving

HubSpot Sales Hub, Dynamics, Salesloft and Chorus replace one per-seat bill with another, plus a migration. The wrapper survives the move.

3. Re-pointing every integration

Rewiring Marketo, ZoomInfo and the rest one by one turns a back-end swap into a vendor project. Build the Salesforce-compatible API once, and they keep working.

4. Sending at full volume on day one

New domains and IPs need 2–4 weeks of warm-up. Skip it and the first sequences land in spam, which takes far longer to undo than the warm-up takes to do.

5. Cutting over before the numbers match

A forecast that is off by one deal loses the CFO's trust. Run each pilot until pipeline, forecast and access agree.

And one that is not a mistake: starting with the CRM

Many teams start with Sales Cloud, where the math is sharpest and the record lives, and add Outreach, Gong and Apollo within six months. Build the foundation for all four on day one, and each later module is a smaller project.

RATHER HAVE IT BUILT?

We build this exact plan. *Fixed price.*

The same record, four modules and cutover, delivered by a senior team that has shipped 250+ products.

$79,900 fixed for all four modules, $16,300 less than four separate rebuilds; $120,700–$179,400 from 300 reps, with multi-region, advanced forecasting and custom CPQ

Live in 14–18 weeks, with a four-week pilot per module before cutover

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All four vendor configs moved: objects, sequences, recordings and lists; Marketo, ZoomInfo and your other tools unchanged

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90-day warranty, four quarterly check-ins through year one, and the code in your GitHub from day one

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We can run it for $18,000–$36,000 a year, all four modules

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