

# Chocolatey Software Health Check



## Background

Chocolatey Software are a high-tech Software Product organisation whose primary focus is to support organisations deploy programmes on the Windows operating system more simply and easily. As a business, they started as an open source project and now have over 700M downloads with a scaling user-base. Their goal is to ensure they can respond to customers quickly, giving them the tools, techniques and approaches they need so their can be more effective with their IT departments.

## Objectives

Chocolatey software is going through a growth phase, therefore needed to ensure their Salesforce implementation was in a fit state to grow with them. Therefore, they chose Adapt IQ to review Salesforce against best practice configuration as well as their organisational needs.

## Our Solution



### 01. Understanding their Objectives

In order to perform a technical review, we initially needed to understand Chocolatey Software's sales and support processes. This enables Adapt IQ to assess any variance from industry best practice and determine if it is appropriate for the specific use-case or not.



### 03. Integration & Customisation

The resulting assessment report provided a number of recommendations to bring Salesforce into closer alignment with best practice and Chocolatey Software's processes. This report didn't only consider improvements to the existing implementation, but also provided recommendations to roll-out currently unused features and detailed how these should be implemented to support future company growth. Moreover, the output also considered how identified process changes should be prioritised along with the recognised enhancements which were needed to support business expansion.



### 02. Defining their Approach

Following this, we reviewed the Salesforce implementation against Chocolatey Software's process to determine two things; how well it supports the Chocolatey and best practice processes, as well as the solution's technical suitability.



### 04. Delivery

Adapt IQ completed the engagement by implementing a number of the highest priority changes and enhancements to ensure Salesforce support the immediate growth plans of the business. Together, we now have a backlog of requirements to evaluate and progressively deliver against which are aligned to Chocolatey Software's strategy vision and needs.



*Adapt IQ are more than our technology suppliers.  
They are our business partners.*

- Mukesh Sharma, COO, Chocolatey -



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