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Salesforce solutions for growth-stage companies.

We turn scattered processes and quarterly fire drills into revenue operations that actually work.

Who It's For

- › Well-funded startups & growth-stage companies (\$4M–\$40M revenue)
- › Using Salesforce but not getting real value from it
- › At an operational inflection point: what used to work has stopped working
- › No in-house Salesforce architect or dedicated RevOps/Sales Ops team

What to Listen For

“Our Salesforce data is a mess; we don't trust the reports.”

“Quarter-end is a fire drill every single time.”

“We just closed our Series A/B and need to scale operations.”

“We've been told that would require custom development — so we gave up.”

What Makes RootMode Different

1 Business Goals First, Salesforce Second

We start with the business problem — revenue visibility, quote-to-cash, scaling operations — not Salesforce features. Every recommendation is right-sized for where the company is today and where they're headed.

“You took the time to understand our needs... because you don't know what you don't know.”

— Director of Operations, MosaicNetworkx

2 Senior Architect Expertise, Startup Empathy

Certified Salesforce Data Architect and Revenue Architect working directly with your team so you don't have to manage a bench of junior consultants. Enterprise-level architecture at growth-stage budgets, from someone who feels like part of the team.

“It doesn't even feel like you're a contractor — it feels like you're part of our company.”

— Director of Business Operations, Nutrafol

3 Making the Previously Impossible Affordable

AI-assisted development means custom Salesforce functionality that used to require enterprise budgets or large dev teams is now within reach — in weeks, not months, at a fraction of traditional cost.

Two people, two weeks — replaced an enterprise tool with native Salesforce.

— Impossible Foods project (submitted talk for TDX 2026)

How We Help

Recurring Revenue Clarity

Real-time MRR, ARR, churn, and renewal tracking that finance trusts and sales uses

Quote-to-Cash That Works

Streamlined quoting and pricing — quotes in hours, not days, fewer errors

Systems That Talk to Each Other

Integrations connecting Salesforce to ERP, billing, marketing — one source of truth

Scale Without Chaos

AI-assisted custom development, data architecture, and automation that handles 10x growth

Salesforce Consulting Partner · Revenue Architecture Certified · Data Architecture Certified · 20+ years business process design
Trusted by: Nutrafol · Impossible Foods · MosaicNetworkx · Udemy · Solidify Mortgage · Würk

How to Refer

I prefer warm introductions — please make sure the contact is open to hearing from me. A brief overview of their situation is always helpful. Email intro or have them book directly: rootmodeconsulting.com/letstalksalesforce

30-minute call → They talk with me directly (not a sales team) → Honest assessment of fit