



Salesforce Health Check

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Positive digital flow

Do you feel you aren't getting the most out of your Salesforce implementation? Is user adoption lower than expected or do your users feel that they aren't as productive as they could be with Salesforce? Is your organization experiencing issues with its Salesforce org as it has grown since the initial implementation? Are you facing any security issues where data can be viewed or changed by people that shouldn't have access?

Is the answer to any of the questions "yes"? Then a Salesforce Health Check can help you out to increase efficacy and efficiency.

Our approach

- 1. Assessment meeting:** A first assessment meeting helps us understand your needs. The main challenges and your goals are discussed, and the focus areas are determined.
- 2. Health check:** Depending on the outcome of the first assessment, the Health Check itself will be focused on the organization and/or on the system. Inetum-Realdolmen's Salesforce experts will work together with you to **review the architecture, the code and the development processes, the scalability of the system, the security setup, and the level of adoption.**
- 3. Reporting:** We provide a report summarizing your current Salesforce org and recommendations to improve the use and efficiency for you and your colleagues.

On average this project will take two or three weeks to complete. Of course, that depends on the availability of the various stakeholders.

Deliverables

- Clear view on the health of your Salesforce organization, including the security setup, process automations, recommendations on best practices, visibility into integrations, and the data model
- Report with an overview of the already implemented processes
- Findings on the root cause (of low user adoption, security setup issues,...)
- Remediation plan
- Recommendations on your current Salesforce org
- Recommendations to increase adoption

Our Health Check is complete. What now?

Let our certified Salesforce experts help you implement optimizations based on these recommendations.

Interested in a Salesforce Health Check for your organization?

Contact our experts with all your questions: info@inetum-realdolmen.world or +32 2 801 55 55.