



SALESFORCE ASSESSMENTS SUITE

Enable your organization to improve efficiency and strategic value. Our suite of assessments provide in-depth evaluations of your Salesforce platform, process automation and user adoption; strengthens your utilization of the powerful suite of reporting and analytics tools.

Our experts complete your assessment in days or weeks, not months, and you receive detailed documentation of your current configuration and pain points, but more importantly, recommendations to address those pain points and any inefficiencies to achieve greater value.

Lightning Migration Assessment:

- Generate and review the latest Lightning readiness report
- Business process review sessions with key stakeholders
- Estimation and recommendation on approach and timeline
- User adoption and change management plan

CPQ Readiness Assessment:

- Review current quote-to-cash process with key stakeholder
- Evaluate the potential utilization level of CPQ
- Recommendation on strategy and approach on CPQ implementation, estimate, timeline and integration needs

System Utilization Assessment:

- Review objects, automation, integration, custom development and add-ons
- Business process review sessions with key stakeholders
- Recommendation on strategy and approach to reduce manual processes and improve utilization and user adoption

ERP Integration Assessment:

- Review current quote-to-cash process with key stakeholders
- Evaluate readiness for utilizing standard Salesforce to Sage and ERP Advanced CRM Connector and any additional custom development needs
- Estimation and recommendation of timeline and cost

Salesforce Analytics Assessment:

- Business process review sessions with key personas (Admin, IT, Finance, Marketing, Executive Committee, Sales and others)
- Review the current reports, dashboard, Einstein utilization and other analytics mechanism
- Recommendation on persona-based approach to track, visualize and evaluate data in real time

Contact to discuss these assessments and more!

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