



## How do you know if your Salesforce® implementation is evolving with the changes in your business?

As you grow as an organization, has your Salesforce® system kept pace with the changes in new structure, process and priorities? It is very important to make sure the health of your Salesforce® implementation is strong. You invested in Salesforce® in the first place with the intention of enabling your business. Let CleanSlate make sure you are reaping the benefits and returns leading to effective sales processes, automated business processes and insights into the key metrics running your business.

### Salesforce® Assessment Tracks:

#### Business Track

- Define appropriate profile and data access
- Improve business process automation
- Ensure data quality
- Leverage page layouts, reports and dashboards
- Utilize AppExchange packages

**Deliverable:** Document summarizing existing business processes being managed entirely or partially with Salesforce® and recommendations for increasing efficiency and user adoption.

#### Technical Track

- Validate Salesforce® user licensing
- Analyze disk utilization and API usage
- Review data architecture
- Perform static code analysis of Apex and VisualForce best practices
- Environments and deployment process

**Deliverable:** Document summarizing the technical health of your Salesforce org along with recommended corrective actions to improve overall health.

#### Outcome of Assessment

- Comparison of existing architecture with best-practices industry reference architectures
- Assessment of your Salesforce® implementation against key business drivers and focus areas
- Detect and correct potential problems before they occur or develop into major defects
- High-level recommendations for training, documentation and process improvements

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**JENNIFER MAXWELL**

Business Development Executive

866-885-3249 x912

jennifer.maxwell@cleanslatetg.com

**CHRIS KONOW**

VP of Consulting

866-885-3249 x905

chris.konow@cleanslatetg.com

