

## Tquila Salesforce Health Check

### Driving Value from your Salesforce Investment

#### As your business grows...

- Do you know if your Salesforce implementation is evolving in alignment with your business?
- Has your software been kept in lockstep with changes in your organisational structure, scale, processes and priorities?

#### Is your Salesforce aligned to help you...

- **Increase Revenue** - are you leveraging efficiently for improved acquisition, sales conversions, upsell and cross sell and customer retention
- **Reduce Costs** - through Digitised Processes, Process Efficiencies, Digitised Intake, Automation, Workflows, Self-Service, Supply Chain Integration
- **Improve Outcomes** - for your Customers, Staff, Partners and Suppliers?

Just as you need to keep a pulse on the business, it is equally important to keep tabs on the health of your Salesforce implementation so that you can drive the maximum business value.

#### Tquila Health Check Overview

You made an investment with the goal of enabling your business. While you may have had Salesforce for a period of time and it may be working well, you still want to ensure that your investment is reaping returns leading to effective sales processes, automated business processes, and insights into key metrics.

How will your business achieve tangible gains if your processes are not coupled with the technology to drive results?

What steps you need to take to ensure you assess current state, plan for the future and evolve to embrace innovation.

#### Tquila Health Check Deliverables

- Improved understanding of the existing implementation
- Prioritised tangible list of recommendations to improve upon the 'as-is' state
- Credible plan to substantially boost key CRM metrics such as user adoption and productivity
- Comparison of existing architecture with best practice industry reference architectures
- Assessment of your Salesforce architecture against key focus areas
- High-level recommendations for training, documentation, and process improvements
- Minimised operating costs
- Full Recommendation Report

“ We have engaged with Tquila to build out a stronger foundation for our Salesforce driven business platform. Based on our interactions and work they have done to date, we can happily say that we look to Tquila as trusted advisors and partners in our success. An impressive team, they deliver outcomes with accountability, care and professionalism. *Ed Leong, Harrier National* ”



## Technical Health Check

Designed to assess the quality of the existing implementation and identify any technical problems hidden from view. Focus areas include

- Salesforce.com governor limits analysis
- Adherence to Salesforce.com security protocols
- Data model review
- Apex and VisualForce code review of usage and quality
- Maintainability
- Integration
- Environment and release process
- Recommendation Report

### How we do it

#### Discover

Stakeholder meetings to establish:

- the original business plan, target vision and roadmap for the platform
- the 'as-is' state of your Salesforce.com platform
- business engagement, collaboration effectiveness and current business output
- known areas of concern or pain points from key stakeholders

#### Analyse

An in-depth platform and data review

#### Validate

Discussions as required to raise clarification questions in response to our analysis

#### Document

The output of our work will be a **Health Check Report** which will:

- score each of the main review areas
- prioritise our findings so you have an understanding of their overall and relative importance
- detail a targeted action plan and timetable to address any immediate issues identified
- explore the findings in detail and suggest recommendations on how to address any issues we highlight

#### Playback

A final review to discuss findings and recommendations - a chance for your to ask us about anything in the report

Tquila ANZ is a pure play Salesforce Platinum Consulting Partner helping customers transform their businesses by delivering awesome integrated solutions.

Through innovation and thought leadership we deliver on what we promise: to our customers, our partners, and our employees.

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