



### Salesforce Org HealthCheck FAQ

#### What is a HealthCheck?

Stimulus Consulting offer a Salesforce org HealthCheck service which is generally a short (a few days normally) investigation into your salesforce org. One or more Stimulus Consultants will visit you and spend the day checking over your salesforce org, speaking to your users and your admins and generally sticking their noses in to your org. They gather the information they need to advise on best practice and possible solutions to any issues you have described.

#### What are the outcomes?

- HealthCheck Report - This is your key outcome for the day. This report will review the good and bad in your org, record hotfixes made and most importantly it will recommend the next steps to be taken if any are needed. With these next steps, we'd obviously like you to come back to Stimulus to help you implement them, but the report is written in such a way that you could take the recommendations to another supplier if you chose and be able to commission specific work with specific outcomes saving you money, or even tackle them in house if you have the skills
- Training - Although not the focus of the day in comparison to Stimulus' other training services, it is almost certain that your system administrators or users will learn something from the consultants whether it be technical configuration skills, how to make better use of the platform features, or even new things they can do that they didn't know were there
- Hotfixes - Some small and low risk changes **may** be made on the day delivering immediate benefit to your business. Risk is key here. All present must be completely confident that the change will not negatively impact existing business processes or necessitate any retraining
- Confidence and Validation of existing work - The HealthCheck isn't just to find the bad, it can also review existing customisations where appropriate and validate that best practice has been followed

#### What do I need to provide?

A meeting room or other suitable secluded space with a projector or shared screen. Internet access for the consultants (generally it will be possible to 4G tether dependent on signal quality but a shared WIFI is better, complete lack of internet access may make it impossible to proceed), along with power sockets and a suitable table or work surface.

#### When do I get the report?

This largely depends on the scope of the org being checked and exactly what could be covered on the day. Generally, the final report will be provided around 1 week after the HealthCheck day. Towards the end of the HealthCheck day your consultant should be able to give you a better idea of timings depending on what they have found during the day so far.

#### Who should be there?

Your system administrator or nominated equivalent person is essential as they will be the one taking us through many of the areas of the system setup. Other useful people to have present are the major stakeholders that own or carry out some of the processes that cause problems, business unit leads, project managers (if this is part of a larger piece of work). It could be anyone really depending on who you feel has any genuine issues or interest in your system. As noted above, this is an active work day where the consultants will need to make progress so try to keep the group small at any one time – you may wish

to shuttle people in and out of the room on a schedule to discuss specific issues and then leave as the day moves on to the next issue.

### **Is there an agenda for the day?**

There will be, but typically we will tailor this to your requirements so it's not really possible to say what it will be before we have planned it with you. For example, how many teams do you want to be involved and which of them have the biggest issues will inform the order of the day and how long we might aim to spend with each group. Of course, the availability of these people who also have a day job to do can be taken into account so every HealthCheck day is different.

The thing to bear in mind is that this is a very hands on workshop, not a meeting so as much as possible the consultants should be left free to work with the system administrators and specific users rather than end up in a screen share with a room full of people. If that approach is preferred Stimulus can still help, but a HealthCheck is not necessarily the best way.

### **Sounds good, how do I get one?**

Get in contact with us via any of the links or methods on our app exchange listing or look us up at <https://www.stimulusconsulting.co.uk>. We'll discuss your needs with you and start to make the arrangements.