

## Development Solutions

# Salesforce Assessment and Roadmap

### Challenge

The client had implemented its own “home-grown” instance of Salesforce, using it for customer relationship management and to manage its portfolio of business. The implementation had progressed over a few years, with consultants coming in to help when needed.

The client needed enhancements to its Salesforce instance, but also wanted to ensure that the customizations, security settings, data models, custom code, and other elements were configured to support its future growth on the Salesforce platform. The client wanted to know if it needed to start over with a new instance of Salesforce, or if it could use its existing instance and data with remediation.

### Experis Solution

The client originally approached Experis to provide a consultant for four- to six months to work at the client’s direction to build new functionality. Because of the client’s overall concerns about its Salesforce infrastructure, we recommended an assessment of the client’s Salesforce configuration and code. The project would also gather requirements for enhancements needed to remediate issues discovered in the assessment and to add new features.

### Results

Experis executed a 90-hour assessment with the client’s business and technical subject matter experts. The assessment revealed that the client’s Salesforce environment had a few small issues but was well implemented.

Experis provided a thorough assessment of the client’s Salesforce instance, outlining detailed requirements to remediate issues and implement needed enhancements to the system. We also included estimates for the effort and a proposed schedule for making the changes. After the assessment, the client chose Experis to implement the recommendations.

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To learn more, contact:

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