

Salesforce Audit

Service Description

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Company Profile

iTechArt is a top-tier, one-stop custom software development company with a talent pool of 1800+ experienced engineers. Since 2002, we have delivered robust solutions to both dynamically growing technology startups and Fortune 500 companies.

We're incredibly honored that in 2018 and 2019 iTechArt became a part of the Inc. 5000 list of the fastest-growing companies. Moreover, last year we won a Bronze Stevie Award as the "Fastest Growing Tech Company of the Year" in the 17th Annual American Business Awards and debuted successfully on Deloitte's 2019 Technology Fast 500 Ranking.

At the same time, we never compromise on the quality of our team members. In 2019, we hired only 658 out of 3293 candidates interviewed. We've been building a dream team of go-ahead developers who embrace our clients' mindset — move fast, think new, and stick to the can-do attitude.

We believe that our clients and the software we created will tell you a lot more about us than we ever could, so here are 7 quick facts about our work:

1. Our startup clients collectively raised over \$2B.
2. Enterprises, such as Google, Oracle, SingTel and Verizon, acquired our clients, while we went on to develop their products.
3. On average, our client saves \$500,000 per year with our development team on board.
4. Our clients are early technology adopters, and so are we.
5. DAQ Electronics, our very first client, has stayed with us for over 10 years.
6. Microsoft, Facebook, Google, Accenture, Uber, Goldman Sachs and many more use the software we created.
7. And above all — our clients send us Christmas cards.

iTechArt ratings and reviews



Our Salesforce Practice

We started our Salesforce practice more than six years ago, and we are proud to be a Salesforce Silver Consulting Partner. All members of our constantly growing Salesforce team are certified by Salesforce and are ready to work both onsite and remotely. We have our own training program for new employees, as our goal is to quadruple (!) the number of Salesforce experts within a two-year time span.

With a delivery center in Belarus, Eastern Europe, we can offer our clients excellent rates while keeping the highest quality service. This, together with just a 1-hour time difference with CET and our ability to work onsite whenever it's required, gives our European customers more advantages than working with local companies or offshore teams.

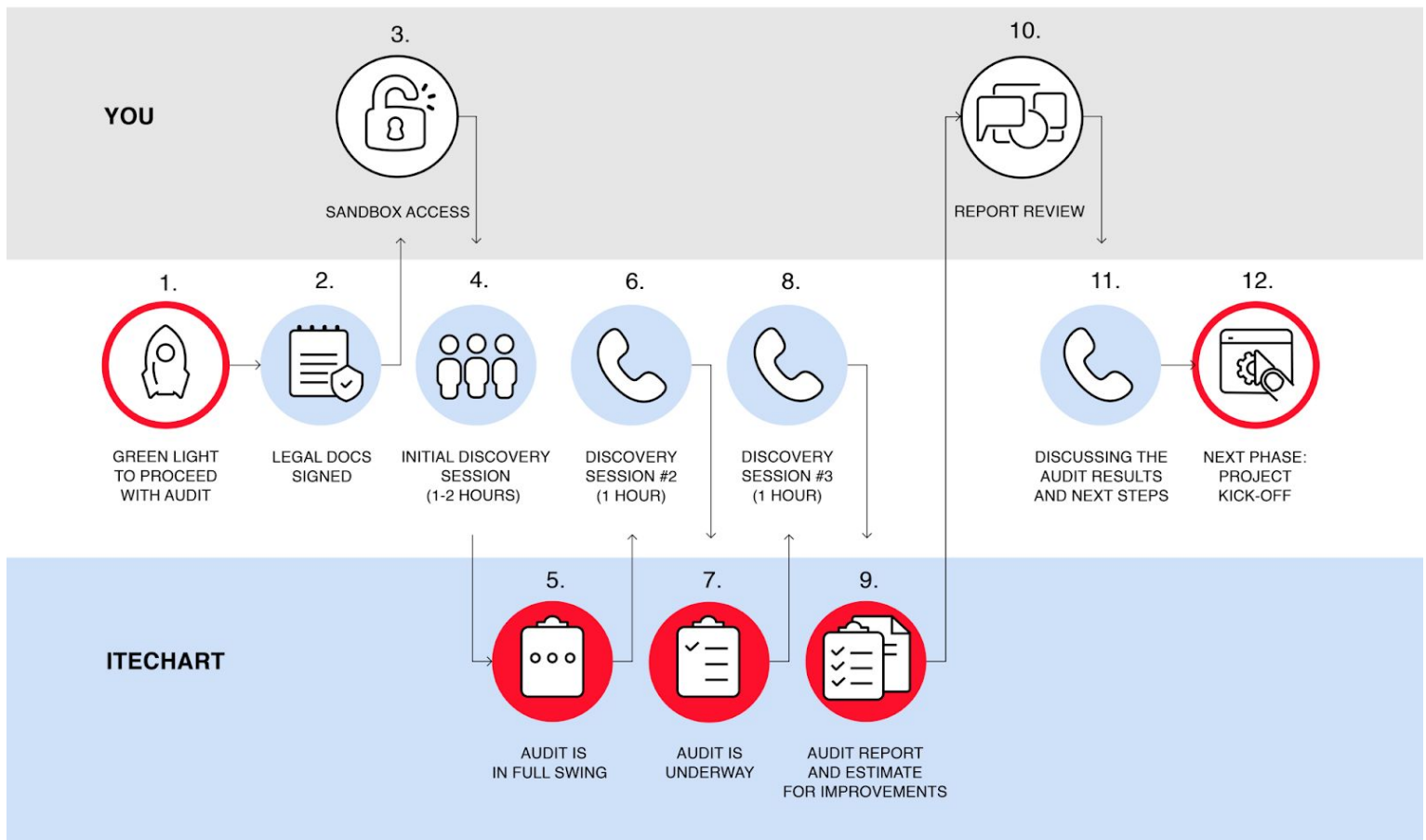
Our customers are always at the center of everything we do. Instead of plain coding, our experts will get to the very core of your business and unlock the true power behind your Salesforce instance. Whether you are looking for an outstanding skill set or just a supporting hand when your significant other is out of town — our team will have you covered.



Salesforce Technical Audit: Service Description

Salesforce Technical Audit is an audit of the current system in terms of security, scalability and fault tolerance.

TECHNICAL AUDIT STAGES



iTechArt Salesforce Technical Audit is designed for companies which:

- Have been using Salesforce for 3+ years
- Have a lot of custom functionality which now has out-of-the-box analogues or doesn't seem to be scalable
- Would like to check the quality of work of their inhouse or external team
- Have concerns about security issues and system performance
- Would like to make the system reflect more business processes

The main **objectives** of the Audit are:

- to reveal strengths and weaknesses of the system
- to oversee potential problems
- to identify and prioritize the processes to be improved and assist in formulating user stories

Salesforce Technical Audit **approach**:

The composition of each Audit will be directed by the focus areas defined by the Customer, but in most cases covers the integrity of the solution design, appropriate mapping of requirements to platform features, quality of the point-and-click build, technical components and integration architecture.

Salesforce Technical Audit **scope** includes:

- Conduction and analysis of automatic Security Check
- Analysis of the systems' security (existing object access settings, availability of user groups, the use of Profiles and other Salesforce setups for the control of the access to records are checked)
- Identifying defects of data access separation
- Manual code check within the framework of compliance with Salesforce access and security management standards
- Defining whether the set of user licenses corresponds to the system functionality
- Application architecture audit not only in terms of Salesforce CRM use but also in terms of the use of additional components such as integrations with third-party services
- Assessment of program logic which includes analysis of classes, triggers, test classes, analysis of implemented standard Salesforce features (e.g. Workflows, Process Builder, Flows, etc.)
- Analysis of the installed packages to find out if they are the optimal solution to cover business requirements
- System optimization analysis in the context of the latest Force.com version
- Identifying current pain points, challenges and potential process improvements

Salesforce Technical Audit **methodology and tools** are:

- Preliminary analysis and planning (analysis of business requirements in terms of the Salesforce system capabilities, investigation of the desired separation of data access) by Salesforce Senior Technical Consultant
- Force.com Security Source Code Scanner. This service provides information regarding the security of the code (specifically Apex and Visualforce) through next generation static analysis tools
- Third-party tools for code analysis and identification of critical components
- Analysis of the system by Salesforce Technical Architects/Cloud Experts
- Documentation of the Audit results

Salesforce Technical Audit is conducted by Salesforce Senior Technical Consultant remotely or onsite. In case of remote work, a few (1-3) discovery sessions with the Customer (via Zoom or Skype) might be required.

Once the Audit has been conducted, the Customer receives an audit report containing the information about security vulnerabilities, ongoing maintainability/extensibility, and scalability of the existing solution. The report is divided

into chapters and paragraphs in accordance with the Technical Audit scope. Each chapter includes strengths, remarks, possible consequences of the problem (if present) and a solution plan.

In other words, the result of the Audit is **a plan for system optimization** which includes:

- Security optimization plan
- Performance optimization plan
- Reliability optimization plan

In case the Customer is not satisfied with the way the Salesforce instance covers their business processes and requires help with Salesforce roadmap creation, 2 **additional phases** can be added:

1. Map & Analyze As-Is Processes (preferably onsite)

iTechArt Salesforce Senior Technical Consultant will review the existing company business goals and internal processes reflected in Salesforce or possible to optimize using Salesforce, identify disconnects and value adding processes. This will be done by reviewing internal business process documentation, conducting a series of workshops with process owners and stakeholders, mapping current state processes. The objectives for how the project will impact the management team and each department on an individual basis and the business organization as a whole will be defined.

At this point, the current backlog will also be analyzed. Current workflows will be reviewed or created.

2. Design To-Be Processes (Salesforce roadmap creation)

iTechArt Salesforce Senior Technical Consultant will produce a future Salesforce-oriented state for the company departments based on needs, a product backlog and release plan laying out the roadmap. The scope of tasks and budget estimate will be provided to the stakeholders. Proof of concept for potential projects can be suggested and developed.

References



"We have had great success working with iTechArt as extension team members for our key projects. They are very professional and reliable. if you are looking for some additional developers for your next project, I would highly recommend iTechArt to you."

Joe Ruoto
Director of Operations, Scitent

"We had previously worked with ItechArt on other web development projects, utilizing PHP, Drupal, SQL and QA resources with great success. When our organization decided to move from our home grown case management system to Salesforce we were happy to learn that ItechArt also had a team of Salesforce resources available. They have proven to be knowledgeable, dedicated individuals and have increased our team's velocity. We are very happy with the work they have done on the project and look forward to working with them in the future."



Peter Spiak
Product Manager, Seniorlink



"Our experience across the 10+ years with multiples of developers we have worked with has been ideal. The professionalism and expertise as well as attention to detail and development quality displayed is truly World class in every possible way."

Ronnie Fuleihan
Principal, Softensity

"We have found iTechArt's engineers and management to be extremely professional and responsive, catering to all our needs regarding software engineering projects. Their developers are full stack engineers, familiar with scrum methodologies, and can take light requirements and conversations and turn them into user friendly features and cross functional components."



Benjamin Maisano
CTO, CareDox