



Salesforce Assessments

Realize the value of your Salesforce implementation with a Centric Consulting Salesforce Assessment.

**Your business evolves.
Salesforce evolves.
We help you align them.**

Just as your business is evolving to meet your customer's needs, Salesforce is also constantly advancing to keep up with its customers, business processes and data. This can lead to the need to revise your Salesforce instance to both meet your business needs as well as utilize new Salesforce functionality. That's why regularly assessing the health of your Salesforce instance is critical.

Centric can provide comprehensive Salesforce Assessments at all key junctures of the customer relationship management (CRM) lifespan. We recommend assessments whenever you have new tools or data integrated with Salesforce, overhaul a business process, or are coming up on a license renewal.

However, Salesforce Assessments are not just about your business today, but about your business tomorrow. By helping you identify your CRM maturity level, we will make your business more agile and ready for what's next.

The Centric Difference



500+
Marketing Technology and
CRM Projects Completed

Our Salesforce Assessment Components

- ✔ **Feature Review:** Ensure features and releases are adopted and enabled.
- ✔ **License Roadmap:** Review license type, usage and use cases to help improve the total cost of ownership of Salesforce.
- ✔ **Architecture Review:** Recommend data architecture enhancements based on Salesforce best practices. Analyze usage patterns to identify opportunities to improve processes, automations and workflows.
- ✔ **Security Review:** Assess internal data security and visibility and review external data privacy and security functions.
- ✔ **Governance Review:** Make sure your Salesforce solution supports your priority business goals defined in your data governance plan.
- ✔ **Salesforce Assessment Report:** Highlight high-level opportunities for Salesforce implementation improvement, including quick-wins for the near term and longer-term solutions to further optimize your CRM for the future.

Identifying Your CRM Maturity Level

Salesforce customers are as varied as the Salesforce suite itself. Whether you represent a small company investing in its first Salesforce solution or a large business with multiple Salesforce clouds, identifying your CRM maturity level is a key part of every Salesforce Assessment.



The Five Stages of CRM Maturity

2 Users recognize the importance of adding leads, opportunities, cases and activities into Salesforce, but supporting processes and the resulting outcomes are not present.

4 The organization is using Salesforce to make decisions as well as to manage their processes, but new features have not been implemented.



1 Users have recently implemented Salesforce. They may have a few mandatory processes, but the company is only beginning to use the platform.

3 Defined processes for usage and management of marketing, sales, customer service, or other department activities are in place, but users are not basing present and future decisions on the data in Salesforce.

5 The company is making strategic decisions based upon Salesforce information, and its processes and solutions are core to the business and its success. Governance in place to evolve Salesforce as the business evolves.

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