

Salesforce Org Strategy Assessment



Optimize Your Single- or Multi-Org Architecture

As your organization grows and/or faces new opportunities—such as mergers, acquisitions, or changing data regulations—a scalable and effective Salesforce org strategy becomes essential.

Perficient's Salesforce Org Strategy Assessment provides a comprehensive review of your Salesforce environment, ensuring it aligns with your business objectives, whether you're using a single- or multi-org architecture.

Assessment Overview

We analyze people, processes, systems, and governance to deliver actionable insights, and a customized roadmap based on industry best practices.

- **People:** Conduct interviews with key business and IT stakeholders, and define user groups, roles, profiles, and account hierarchies.
- **Process and Reporting:** Document Salesforce processes, review reports and dashboards, and evaluate custom versus out-of-the-box features for improvement.
- **Systems and Data:** Assess your Salesforce set-up, configuration, and code for quality, security, performance, and scalability.
- **Structure and Governance:** Review roles, processes, and capabilities, and document development, release, and governance workflows.

Deliverables

Depending on the scope, we provide the following deliverables to guide your Salesforce org strategy:

- User personas and process flows
- Business outcomes mapping
- Solution, systems, data, DevOps, and integration architecture
- Data model recommendations
- System health check
- Organizational structure and governance recommendations
- Roadmap with key findings and recommended next steps

Why Perficient

We're an Enterprise Salesforce Partner specializing in CRM, data, AI, and personalization. For more than 15 years, we have built industry-specific Salesforce solutions that help Fortune 1000 organizations enable data-driven decisions and deliver personalization at scale.

- 8x Navigator Experts
- 595+ projects
- 1600+ certifications
- 4.8/5.0 CSAT score



Click or scan to check out all of Perficient's thought leadership.