PERFICIENT®

PLATFORMS + TECHNOLOGY

Salesforce Assessment

Evaluate Your Platform's Architecture and Health

Perficient's Salesforce Assessment evaluates the state of your Salesforce investment, identifies inefficiencies, and provides recommendations to optimize your environment for maximum value.

How It Works

During this four-to-five-week engagement we will facilitate a series of workshops and interviews with both business and IT teams to assess your Salesforce org's performance and alignment with business goals. We document each session, conduct a gap analysis against best practices, and produce a formal report with your scorecard.

The Assessment Focuses on Six Domains

- People
- Business processes
- Data and integrations
- Licensing
- Quality and efficiency
- Maintenance and enhancements

Assessment Benefits

The assessment provides actionable steps to optimize your Salesforce environment and offers the following benefits:

- **Increased employee productivity**: Standardize processes, eliminate the swivel-chair effect, and provide a single source of truth.
- **Improved customer experience:** Remove siloed departments and reduce lengthy manual processes.
- **Cost savings:** Reduce technical debt and configure Salesforce for optimal growth.
- **Revenue growth:** Enhance sales efficiency by prioritizing high-impact activities with real-time insights to close deals faster.
- **Scalability:** Enhance the ability to grow the business and use Generative AI tools like Agentforce and Einstein.

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
- 1400+ certifications
- 580+ projects
- 4.8/5.0 CSAT score

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

"Perficient will help you see the potential in what you already have, show you how to optimize it, and find room to grow products you may be underutilizing."

- Perficient Manufacturing Client