

Comprehensive Salesforce Org Assessment

Delivering – Success Through Partnership



🌐 Domain	B2B food & beverages distributor
🏢 Platform	Service Cloud
👤 Number of Users	375+
📍 Region	Europe & United States

🏢 Allied with the Client’s ambitious growth objectives, which required a more robust Salesforce foundation. Provided guidance by identifying risks, addressing technical debt, and ensuring alignment with Salesforce best practices.

Assessment Focus:

-  **Security & Compliance**
Risk assessment and regulatory alignment
-  **Customization & Optimization**
Performance tuning and best practices
-  **Architecture & Scalability**
Future-proofing system design
-  **Strategy & Governance**
Roadmap and operational excellence

Business Impact Delivered:

- Strengthened security & Org health**
Elevated Org from poor to excellent health with robust security posture
- Simplified access model**
Lean profiles & permissions structure, Sharing rules
- Unlocked System Capacity**
Freed object & field limits, Architecture changes mitigating transaction limits, Plan for dropping unnecessary licenses in future
- Optimized automations & Stability restored**
Refactored Apex/Flows/Processes/Triggers, Resolved critical, long-standing issues
- Future-ready governance**
Data archival Strategy & DevOps roadmaps

Tech Stack / Tools

