

TECHNOLOGY SERVICES

SALESFORCE ORG ASSESSMENT & CONSOLIDATION

WHY ORGANIZATIONS CHOOSE TO ASSESS & CONSOLIDATE

As businesses grow, so do the complexities within their Salesforce environments. Whether you're navigating a merger, preparing for AI-driven automation, or simply looking to improve system performance, a strategic Salesforce org assessment is essential.



Unify & Simplify – Merging multiple Salesforce orgs eliminates redundancy, improves data flow, and enhances collaboration.



Prepare for AI & Automation – Ensure clean, structured data and optimized workflows to support AI-driven analytics and automation projects.



Boost Performance – Identify and resolve inefficiencies that may slow down the system and impact user productivity.



Overcome System Constraints – Address resource constraints by optimizing customizations, automations, and integrations.



Enhance Usability & Adoption – Create a seamless, intuitive experience that empowers teams to work smarter, not harder.

HOW WE OPTIMIZE YOUR SALESFORCE ENVIRONMENT

We take a deep dive into your Salesforce org, uncovering inefficiencies and implementing best practices to maximize performance.

- ✓ **Process Mapping:** Gain a clear understanding of your business workflows and identify inefficiencies that impact performance.
- ✓ **Tech Debt Identification:** Uncover outdated, redundant, or conflicting configurations, objects, processes, and code that may be causing performance bottlenecks.
- ✓ **Optimization Assessment:** Evaluate existing automations, customizations, and integrations to ensure they align with best practices and business goals.
- ✓ **Data Hygiene Analysis & Cleansing:** Assess data quality, eliminate duplicates, and implement best practices for maintaining clean and accurate records.
- ✓ **Security & Compliance Review:** Evaluate user permissions, sharing settings, and security protocols to ensure alignment with best practices and regulatory requirements.
- ✓ **Best Practice Guidance:** Receive expert recommendations on streamlining your Salesforce environment to improve scalability and maintainability.
- ✓ **Comprehensive Documentation:** Get a structured and detailed breakdown of your Salesforce org, ensuring clarity for ongoing management and future enhancements.

OPTIMIZE, STREAMLINE, AND FUTURE-PROOF YOUR SALESFORCE ENVIRONMENT FOR PEAK PERFORMANCE

Is your Salesforce org slowing you down?

Whether you're dealing with technical debt, inefficient processes, or redundant customizations, our comprehensive Salesforce Org Assessment and Consolidation services help you regain control and maximize efficiency.

FEATURE	BEFORE OPTIMIZATION	AFTER ASSESSMENT AND OPTIMIZATION
Process Efficiency	Inefficient, redundant, or broken processes	Streamlined workflows and automations
Technical Debt Management	Accumulated legacy code and unused fields	Identification and removal of outdated configurations
Customization Optimization	Over-customization leading to complexity	Best practices for scalability and performance
Data Hygiene & Cleansing	Duplicate records and inconsistent data	Improved data accuracy and deduplication
Security & Compliance	Potential vulnerabilities and misconfigured permissions	Best practice security settings and governance
Documentation & Governance	Lack of clear documentation and oversight	Comprehensive documentation for future changes
System Performance	Performance bottlenecks and sluggish response times	Improved speed and usability

For more information about our services, visit www.sikich.com.

WHY PARTNER WITH SIKICH?

With deep Salesforce expertise and a proven track record, we go beyond surface-level fixes to deliver meaningful transformation. Our team specializes in optimizing Salesforce for industries with complex workflows—including:

- Insurance
- Finance
- Manufacturing
- Life Sciences
- Healthcare
- Education
- Non-Profits

We understand the unique challenges these sectors face and tailor our solutions accordingly.

Our structured, data-driven approach uncovers hidden inefficiencies and pinpoints opportunities for improvement. We don't just assess your Salesforce environment—we provide clear, actionable insights that drive measurable results. Every recommendation is designed around your specific business needs and growth objectives, ensuring that your Salesforce org isn't just optimized for today, but built for long-term success.

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