

# PERFAWARE SALESFORCE BUSINESS VALUE ASSESSMENT

Your Prescription for Salesforce Success!



# Start off on the right foot!

## KEY BENEFITS

- Tailored recommendations designed to drive your business objectives
- Optimized Salesforce performance
- Expert guidance on industry best practices
- Get more value out of your investment in Salesforce
- Address current challenges and prepare for future growth
- Ensure Salesforce is properly implemented



# Unlock your **Lead-to-Revenue** potential with our **End-to-End Consultancy Services**



salesforce

## Customer Relationships

### Advisory Services



- Our approach involves collaborating with you to evaluate and optimize your revenue operations, aligning them with your business goals and aspirations.
- Our team of strategic consultants provides industry-leading guidance and a detailed roadmap for implementing digital transformations that will help you achieve sustainable growth and success.

## Pricing & Configuration

### Technology & Implementation



- We are a technology implementation partner specializing in lead-to-revenue business transformations in the cloud.
- Our team of experts is dedicated to integrating solutions with any ERP system, providing customized planning and execution for successful digital transformations.

## Contracting & Reporting

### Managed Services



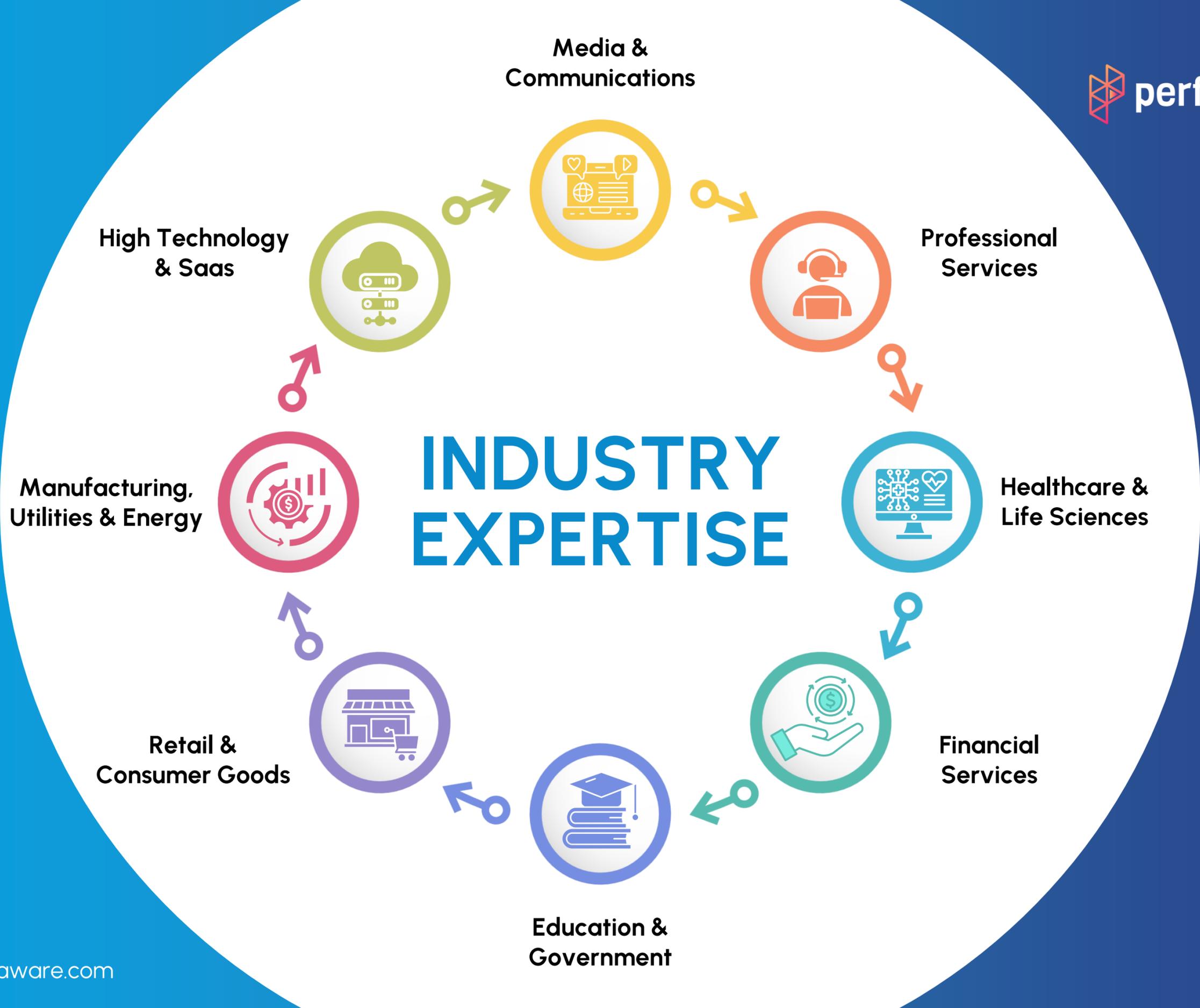
- Get the benefit of our Salesforce & Conga certified expertise as a Natural extension of your current resources through our managed services offering.
- This includes ongoing technical guidance, internal service projects, and product optimization.

## Profit Realization

### Products



- Revolutionize your lead-to-revenue process with our cloud-based ERP pricing engine.
- Our innovative solution decouples pricing from your ERP system, empowering you to make real-time pricing decisions and streamline your operations.



## PROBLEMS SOLVED

# Indications that Signal the Necessity for a Salesforce Business Value Assessment



### User Resistance

Your end-users are avoiding using Salesforce or finding other ways to process data. A Health Check will identify the cause of the resistance and recommend a solution.



### Data Reporting Inaccuracy

Reports lack data or fail to run properly. A Health Check diagnoses the root of the issue and prescribes corrective measures to ensure accurate reporting and data consistency.



### Security Vulnerabilities

While Salesforce maintains robust security measures, user-created vulnerabilities pose risks. A Salesforce security Health Check identifies and addresses such risks proactively.



### Transition Challenges

Smooth transitioning from Classic to Lightning is desired. A Health Check identifies potential hurdles, ensuring a seamless migration process.



### Underutilisation of New Features

New Salesforce updates offer enhanced functionalities. A Health Check identifies untapped features, unlocking new possibilities for business growth.



### Post-Release Issues

Irregular errors post-Salesforce releases disrupt operations. Our Health Check pinpoints issues, their origins, and provides actionable solutions for effective resolution.



### Persistent Performance & Limitation Concerns

Consistent user-reported performance issues or reaching storage limits indicate system challenges. A Health Check addresses these concerns, restoring system efficiency.



### Complexity and Clutter

Unnecessary applications and complex configurations hinder system performance. A Health Check streamlines the setup, reducing clutter and enhancing efficiency.



### Locked Record Problems

Frequent user issues with locked records impact productivity. A Health Check resolves these issues, optimising workflow and performance.

# SALESFORCE BUSINESS VALUE ASSESSMENT

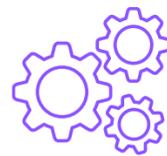


## Security and Compliance



- Data Sharing & Security
- Overall Compliance
- GDPR & Consent Management

## Platform Customisations



- Complexity
- Configuration vs Code
- Best Practice Review
- Code Quality Practice

## Governance



- CoE Maturity
- Release Strategy
- Testing & QA Strategy
- Salesforce Awareness
- User Enablement

## Delivery Methodology



- Program Delivery
- Project Framework
- Agility
- Centre of Enablement

## User Adoptions



- Adoption Metrics
- Training Materials
- User Support Process & Collateral

## Architecture



- Data Model
- System Landscape
- Integration Strategy & Patterns
- Org Strategy

## Data Management & Strategy



- Data Quality
- Data Management
- Data Relevance
- Reporting
- Data Archiving
- Org Strategy

## Usability



- UX / UI
- Mobile Design
- Process / Service Design

With a multidisciplinary team including a Senior Salesforce Architect and consultants certified in the Salesforce clouds you have implemented, we check and make recommendations that will improve the technical robustness, lower TCO, and enhance the Salesforce roadmap for your organization. As a trusted advisor, we can also advise you on the use of new Salesforce offerings and how to set up a Salesforce Center of Excellence.

Plus, we showcase how you can benefit from the implementation of our In-house developed Salesforce accelerators.

# Business Value Assessment



perfaware



## What is a Perfaware Business Value Assessment?

The Perfaware Business Value Assessment is a focused, high-impact engagement designed to evaluate the health and efficiency of your Salesforce environment. Over the course of a few days, our senior consultants conduct an onsite or virtual deep-dive—collaborating directly with your admins and end-users to "look under the hood" of your org. We immerse ourselves in your workflows to gather the critical data required to align your system with industry best practices and solve your most pressing business challenges.

## Our Systematic Approach Includes

### Baseline Benchmarking

We establish clear performance metrics to define your current starting point.

### Issue Identification

We perform a systematic audit to isolate specific site components or configurations causing friction or performance lag.

### Multi-Layered Analysis

Our team evaluates improvement options through a prioritized lens—first leveraging out-of-the-box configuration, then optimizing data sets, and finally addressing custom code only where necessary.

### Collaborative Optimization

While we identify "hotfixes" and immediate wins, any changes to your production environment are only executed through joint agreement and careful coordination.

**The goal is to provide you with a transparent, prioritized roadmap that transforms technical debt into business value**

# Business Value Assessment



salesforce

## What are the outcomes?

### Key Outcomes of the Business Value Assessment

#### Comprehensive Business Value Report



- This is the primary deliverable of the engagement.
- The report provides a transparent audit of your current org—identifying both strengths and critical gaps—and documents any immediate "hotfixes" applied during the session.
- Most importantly, it outlines a strategic roadmap for next steps. While we would value the opportunity to partner with you on these implementations, the report is designed to be fully portable; it provides the specific technical requirements needed to commission work internally or with any supplier of your choice, ensuring you avoid wasted spend.

#### Knowledge Transfer & "Over-the-Shoulder" Training



- While this is not a formal classroom session, the collaborative nature of the day ensures your team gains immediate value.
- System administrators and power users will gain direct exposure to expert configuration techniques, learn to better leverage underutilized platform features, and discover new "out-of-the-box" capabilities that can often replace expensive custom code

#### Architectural Validation & Confidence



- The assessment is as much about confirming what is working as it is about finding improvements.
- We provide a rigorous "best practice" validation of your existing customizations.
- This gives your leadership team peace of mind that your current build is stable, follows Salesforce standards, and is ready to support your 2026 growth objectives.

## Who should be there?

### Attendee & Session Guidelines

