



Salesforce Health Check Offering

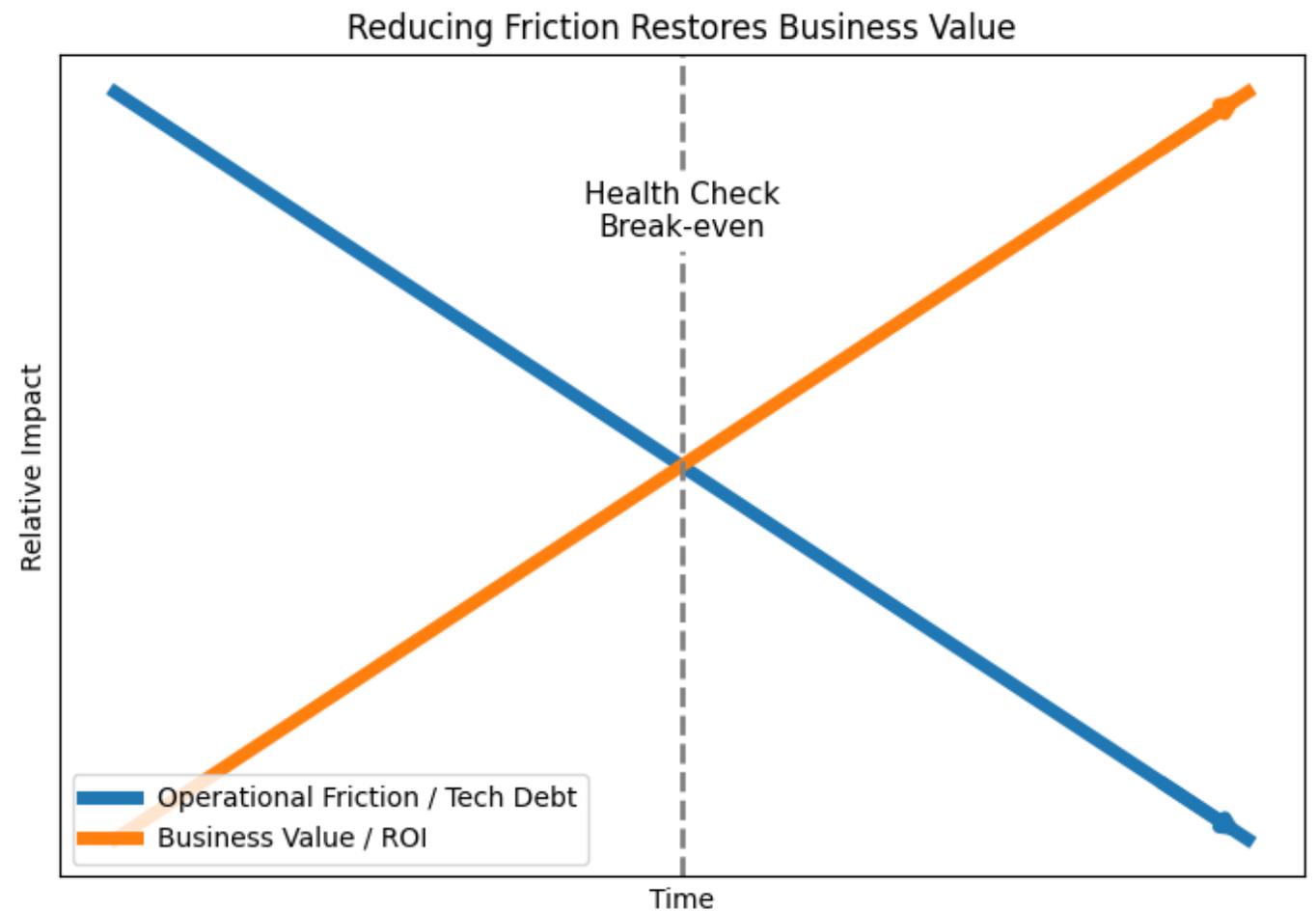
Foundational Readiness for Sustainable Salesforce and AI Adoption



WHY HEALTH CHECKS MATTER

Over time, unmanaged complexity increases operational drag and slows the delivery of business value

- Health checks identify where drag is being created unnecessarily.
- Reducing drag lowers cost and enables steady, incremental improvement.
- Without an explicit health check, organizations spend more each year to deliver less — and AI initiatives amplify that imbalance rather than correcting it.





PLATFORM AND AI HEALTH CHECKS

Salesforce platforms evolve quickly, while most implementations accumulate friction over time

General Platform - Ensures your Salesforce platform supports delivery instead of consuming it.

- Reduces unnecessary complexity that increases cost and slows change.
- Improves reliability so enhancements are easier and safer to deliver.
- Provides a clear, prioritized set of actions to simplify the platform.

AI - Ensures AI is applied where it adds value, and avoided where it adds risk

- Identifies workflows where AI can safely augment existing processes.
- AI often acts as a canary in the coal mine, surfacing data quality and governance issues early.
- Delivers guardrails for responsible, auditable AI adoption.



HEALTH CHECK TIERS

Free Health Check (1–2 Days): Directional assessment and high-level roadmap toward a clean, upgradeable, AI-ready platform

- Rapid review of Salesforce org structure, core data model, and automation patterns
- Identification of obvious friction points, risk indicators, and AI readiness constraints
- Assessment of whether current issues are structural, procedural, or data-driven
- High-level roadmap outlining the path toward a cleaner, upgradeable, AI-ready platform
- Clear recommendation on whether deeper assessment is warranted and why

Paid Health Check (1–2 weeks): Platform and data assessment with execution planning

- Targeted deep-dive into data quality, automation integrity, customization drivers, and governance maturity
- Validation of which issues materially impact cost, delivery speed, risk, or AI feasibility
- Detailed execution plan covering near-term remediation and mid-term modernization
- High-level implementation guidance for AI and Agentforce relevance based on real process maturity
- High-level ROI and effort framing to support funding, sequencing, and go/no-go decisions



WHY RAVENPATH

We focus on foundations before hype.

- We separate signal from noise to support informed decision-making.
- We design for incremental, sustainable progress.
- We bring experience in regulated and complex Salesforce environments.
- We respect time, budget, and operational constraints.
- Salesforce services delivered by senior-led teams with scalable delivery support.



A New Path to a better Transition

RAVENPATH

Ravenpath Consulting helps organizations modernize Salesforce, prepare for AI, and build lasting digital capability.

Whether you're optimizing an existing org or launching a new platform, our team can help you move faster and smarter.

Let's talk about your Salesforce modernization roadmap.

Contact us at info@ravenpath.ai or visit www.ravenpath.ai

Ravenpath Consulting — Strength with Perspective.