



Perfaware Salesforce Business Value Assessment

Your Prescription for Salesforce Success!

Is Your Environment Signaling a Need for an Assessment?

The Why – Typical TMT Triggers

User Resistance & Shadow IT

When teams bypass Salesforce for spreadsheets or disconnected tools, it signals fundamental usability issues and creates data silos and compliance risks. Our assessment identifies root causes and recommends targeted solutions to drive adoption.

Reporting Inaccuracy & Data Quality Issues

Mission-critical dashboards that fail to load or display conflicting metrics undermine decision-making across the organization. We diagnose underlying data model problems, validate integration health, and establish governance processes.

Complexity & Technical Clutter

Years of overlapping flows, outdated process builders, and spaghetti integration logic create a maintenance nightmare that slows performance. Our assessment maps your automation landscape and provides a clear path to simplify using modern tools.

Post-Release Friction & Platform Instability

Unexpected errors and locked records after Salesforce releases indicate technical debt or non-standard configurations that erode platform trust. We identify compatibility risks and establish a proactive testing strategy for smooth upgrades.

Eroding ROI from Technical Debt

Misconfigurations, underutilized features, and inefficient processes silently drain value from your Salesforce investment. Our assessment quantifies these hidden costs and delivers a prioritized remediation plan that reclaims ROI.

Typical Symptoms for a BVA

Is your Salesforce environment signaling a need for a 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.

Security Vulnerabilities

While Salesforce maintains robust security measures, user-created vulnerabilities pose risks. A 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.

Underuse of New Features

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

Post-Release Issues

Irregular errors post-Salesforce releases disrupt operations. Our Health Check pinpoints issues and provides actionable solutions.

Persistent Performance & Limitation Concerns

Consistent user-reported performance issues or reaching storage limits indicate system challenges.

Complexity and Clutter

Unnecessary applications and complex configurations hinder system performance. A Health Check streamlines the setup.

Locked Record Problems

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

Who We Are

Leading Salesforce Systems Integrator

Expertise across B2B, B2C, OMS, Marketing, Data Cloud, Agentforce and overlay solutions for Sales, Service, Revenue, and MuleSoft

Experience across RCG, MFG, HLS, TMT, and CBS industry verticals

Proven experience integrating ERP, WMS, Payment Providers, Marketplaces, and Tax engines

Built-In Accelerators for most Salesforce solutions

Digital Transformation and Omnichannel solutions across AMER, EMEA, and APAC

Global delivery model (Onshore + Nearshore + Offshore) for speed, stability, and cost balance

Trusted partner mindset committed to sustained client success

The Perfaware Difference

Why Organizations Choose Perfaware

Guaranteed Client Success

We strive to create referenceable customers across the Salesforce Solutions portfolio, including organizations like Abbvie, Merz Aesthetics, and more.

Industry Veterans

Most of our principals, architects and leads have upwards of 10+ years in Digital Transformation initiatives.

Strong Network and Relationships

Our network is strong especially in HLS, Retail, Manufacturing, and Distribution.

Domain Expertise

We understand the domain, omni fulfillment challenges, supply chain, invoice/settlement, and have built accelerators for SLA notifications, consolidations, and more.

Perfaware + Salesforce

Strategic Partnership for Your Success

Product Roadmap Alignment

By specializing in Salesforce Platform Cloud, Perfaware aligns with the Salesforce product roadmap to help you unify and optimize the entire quote-to-cash process, driving scalable growth for your business.

Industry Innovation

We stay current on the latest product innovations and industry trends by participating in all major Salesforce events, including SF Connections, Partner Summit, Dreamforce, SF Live, and World Tours.

Global Reach

Our 150+ Salesforce consultants across the U.S., Chile, and India strengthen our practice and provide a comprehensive talent pool for efficient project scaling.

Certified Expertise

Certified experts with deep, industry-specific knowledge contribute to every Salesforce project, ensuring high-quality implementation by seasoned professionals.

Client Success Focus

We work closely with sales teams during deal pursuits, ensuring we deliver solutions that align with their goals and maximize results.

Unified Approach

We work with the Salesforce Alliances team to ensure our services align with their market strategy, providing seamless customer solutions.

Business Value Assessment

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.

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.

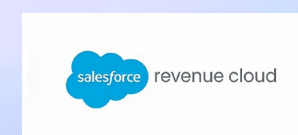
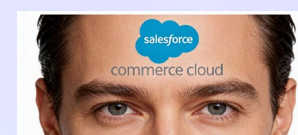
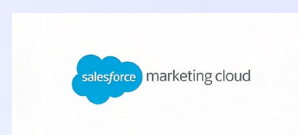
Multi-Layered Analysis

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.



Salesforce Products Assessed

The TMT Salesforce Stack – BVA Evaluation

Sales Cloud

Org configuration, data quality, automation conflict analysis, and security model.

Service Cloud

Case management, service console optimization, omni-channel routing, and knowledge base structure.

Marketing Cloud

Contact data health, Journey Builder logic, and Marketing Cloud Connect sync.

Commerce Cloud

Digital storefront performance, product catalog optimization, and checkout flow analysis.

Revenue Cloud

CPQ configuration, quote-to-cash processes, subscription management, and revenue recognition.

MuleSoft/Integrations

API-led connectivity, security posture, and runtime environment health.

A Deep-Dive Under the Hood

Our Multidisciplinary Approach

The Team

Led by Senior
Salesforce Architects
and multi-cloud
certified consultants.

The Methodology

A 5-day high-velocity
sprint designed for
minimal disruption.

The Philosophy

We optimize via a
Configuration-First
lens—leveraging out-
of-the-box features
before touching custom
code.

The Collaboration

Direct partnership with
your admins and end-
users to identify
hotfixes and long-term
wins.

SALESFORCE BUSINESS VALUE ASSESSMENT

ASSESSMENT TASKS - ACTIVITIES

Security and Compliance

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

Platform Modification

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

Governance

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

Data Management & Strategy

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

Architecture

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

User Adoptions

Adoption Metrics • Training
Materials • User Support
Process & Collateral

Usability

UX / UI • Mobile Design •
Process / Service Design

Delivery Methodology

Program Delivery • Project
Framework • Agility • Centre
of Enablement

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 technical robustness, lower TCO, and enhance your Salesforce roadmap.

From Discovery to Readout in One Business Week

The 5-Day High-Velocity Roadmap

1

Days 1-2: Discovery & Kickoff

Stakeholder interviews and environment onboarding.

2

Days 2-4: Technical Deep-Dive

Concurrent review of Sales, Marketing, and Integration domains.

3

Day 5: Synthesis & Readout

Risk scoring, findings prioritization, and executive presentation.

Business Value Assessment

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 with specific technical requirements needed to commission work internally or with any supplier of your choice.

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.

CMT-TMT Business Value Assessment

Who should be there? - Attendee & Session Guidelines

Core Participants

- **System Administrator:** Required for the duration to provide deep-dive access into system configurations and setup.
- **Key Stakeholders:** Business unit leads and process owners who experience daily pain points or oversee the impacted workflows.
- **Project Leadership:** Project Managers (if applicable) to ensure alignment with broader strategic initiatives.

Dynamic Attendance & Session Strategy

- **Scheduled Shuttling:** To respect everyone's time, we suggest scheduling subject matter experts (SMEs) for specific blocks to address their unique challenges, then allowing them to return to their day.
- **Focused Progress:** To maintain high productivity during this Active Workday, we recommend a small core group. Keeping the room lean ensures consultants can move efficiently through technical issues and process mapping without losing momentum.

Strategic Investment with Immediate Returns

Investment & Next Steps

Investment Summary

This focused 5-day engagement requires only a minimal fixed-fee investment—delivering a comprehensive health assessment, prioritized roadmap, and actionable insights that typically identify cost savings and efficiency gains worth 10-20x the engagement fee.

Next Steps

Proposal Acceptance: Confirm engagement via email.

Access Provisioning: Provide read-only access to your Orgs.

Kickoff: Align on priorities and stakeholder availability.

Contact: Al Ramirez | (214) 641-2580 | al_ramirez@perfaware.com

COMPREHENSIVE INDUSTRY EXPERTISE

Technology & Software

Solutions and services for software platforms, cloud, and enterprise technology providers.

Manufacturing

Operational excellence, supply chain optimization, and production efficiency for manufacturing operations.

Utilities & Energy

Energy transition initiatives, grid modernization, and sustainable utility management solutions.

Retail & Consumer Goods

Omnichannel strategy, merchandising, and consumer insights for retail brands.

Media & Communications

Content distribution, digital platforms, and audience engagement solutions.

Healthcare & Life Sciences

Clinical operations, regulatory compliance, and health technology innovation.

Unlock Lead-to-Revenue potential with our End-to-End Consultancy Services

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.

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.

Managed Services

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