

SALESFORCE 'HEALTH CHECK' REVIEW

The Simplus Health Check Review creates a comprehensive review of the Sales Cloud process and implementation. It helps your organization identify the specific steps to maximize the value of Salesforce.

The best practice recommendations for Salesforce can vary by organization, but in general, customization of Salesforce should be manageable and useful to the company - driving decisions and activity to increase revenue and productivity.

SALESFORCE GENERAL BEST PRACTICES	
<p>"Plan 3 Years Ahead."</p>	<p>What do you like about the current process?</p> <p>What do you need to improve or change immediately?</p> <p>What do you envision for the next three years?</p> <p><i>Without a clear plan for the future and immediate changes, your Salesforce org will morph at the whim of the daily requests, losing its utility.</i></p>
<p>"If it's Not in Salesforce, it Doesn't Exist."</p>	<p>Make Salesforce the single source of data.</p> <p><i>Make sure to migrate data and create lead input methods like web to lead and email to lead.</i></p>
<p>"Follow the Sales Process and Trust Your Forecast."</p>	<p>The entire sales process should live within Salesforce and be fully automated. Enforce sales discipline to be sure the opportunity forecast is reliable and stages are relevant.</p> <p><i>Define the sales process, set record types, stages, page layouts and workflows to enforce the sales process.</i></p>
<p>"Dashboards are for KPIs. Reports are for Analysis. List Views are for Activity."</p>	<p>Each user should have relevant Dashboards, Reports and List Views that guide daily decisions and activity.</p> <p><i>Create Dashboards for KPIs and exceptions. Include Reports and List Views to guide decisions and activity.</i></p>
<p>"Keep Data Secure."</p>	<p>Make sure you follow Salesforce guidelines for user login and data security. Run the Security Health Check in Setup.</p> <p><i>Update security settings to reflect the org structure and requirements for Salesforce best practice.</i></p>

SYSTEM REVIEW TOPICS & BEST PRACTICE RECOMMENDATIONS	
Data Integrity	<p>Does all of your data land in Salesforce?</p> <p><i>Consider data migration and automated tools to enforce data standards and make sure all data is in Salesforce.</i></p>
Process Integrity	<p>Does your sales process live completely in Salesforce?</p> <p><i>Consider integrations, installed packages and automation to reduce process leakage.</i></p>
Security Setup <ul style="list-style-type: none"> • Org Wide Defaults • Profiles • Roles • Permission Sets 	<p>How many custom profiles, roles and permission sets?</p> <p><i>10-50 is common, should be a manageable number.</i></p> <p>How are org wide defaults set? Private?</p> <p><i>Set to private for larger companies and sensitive info.</i></p> <p>How many sharing rules?</p> <p><i>10-50 is common, should be a manageable number.</i></p> <p>Should you modify your security settings and profiles?</p>
Licenses and Utilization	<p>How many licenses are allocated?</p> <p><i>Some small percentage should be available for use.</i></p> <p>How is the user login frequency?</p> <p><i>Users not logging in every day and/or week are not using Salesforce.</i></p>
Data Backup and Storage	<p>How large is the data set?</p> <p>Do you need more storage?</p> <p>Do you have a weekly backup of the data set?</p> <p><i>Use Data Export to set weekly backup.</i></p>
Price Books, Quotes and CPQ	<p>Is the estimate, quote and proposal process completely accurate and automated?</p> <p>Are there Price Books and tools like SteelBrick or Conga fully implemented?</p> <p><i>Ensure that quotes are accurate and automated to be quickly produced and improve sales cycle times.</i></p>

SYSTEM REVIEW TOPICS & BEST PRACTICE RECOMMENDATIONS

<p>Standard Objects</p> <ul style="list-style-type: none"> • Leads • Account and Contacts • Opportunities • Cases 	<p>How many custom fields? <i>Custom fields should be in the low hundreds. They should have purpose and be used.</i></p> <p>Are there duplicates? Are they well documented? <i>Check for duplicate leads, accounts, contacts, fields.</i></p> <p>Are opportunities well managed each month? <i>Opportunities should be well managed and show activity every week/month.</i></p> <p>How record types and page layouts? <i>Record types and page layouts should be kept to a minimum per profile.</i></p>
<p>Custom Objects</p>	<p>How many custom objects? <i>10-20 average. Custom objects should be kept to a minimum for management.</i></p>
<p>Automation</p>	<p>How many workflow rules? How many validation rules? <i>10-50 is a manageable quantity.</i></p>
<p>List Views, Dashboards and Reports</p>	<p>How many of each? <i>Dashboards = 1x Profiles. Reports = 10x Dashboards. List Views = 1x Reports.</i></p> <p>Run a last used report for reports and dashboards. <i>Delete dashboards and reports not used in 120 days.</i></p> <p>Clean up the data summaries and buckets?</p>
<p>Installed Packages</p>	<p>List them. What can be removed? <i>10-50 can be managed.</i></p> <p>Are any sending data outside of the org?</p>

SYSTEM REVIEW TOPICS & BEST PRACTICE RECOMMENDATIONS	
Salesforce Security Health Check	<p>Are the security settings properly configured?</p> <p><i>Under Setup > Security Controls > Health Check, Salesforce will check Network Access, Session Settings and Password Settings against best practice settings.</i></p>
Lightning	<p>Has it been enabled?</p> <p>Where can the company best leverage it?</p> <p><i>Consider testing in teams.</i></p>
Annual Review Schedule <ul style="list-style-type: none"> • Releases • Dreamforce • Training 	<p>Do you have an annual review schedule to make sure you are improving each element of Salesforce on a regular basis?</p> <p><i>Consider Salesforce releases, Dreamforce and training in your annual plan.</i></p>

REVIEW GRADES	
A	<p>Three year plan is present and structured. Integrations are implemented and functioning well. Report and Dashboards offer actionable information. Salesforce is functioning well and doesn't need additional help.</p>
B	<p>Salesforce plan needs minor adjustments/enhancements to be fully impactful.</p>
C	<p>Salesforce plan could be improved; some critical adjustments to settings and processes are recommended.</p>
D	<p>Salesforce plan should be significantly improved; adjustments to settings and processes are strongly recommended.</p>
F	<p>Salesforce plan is grossly underutilized/misused; a significant overhaul of the system use is recommended.</p>