



Sample Salesforce Health Check Report - Findings & Recommendations



Execution Methodology



Workshop Goals



Key Workshop Findings



Org Health check Findings



Recommendations



Next Steps & Timeline



Appendix

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Workshop Goal



Discuss current challenges & pain points



Map internal/external customer journeys

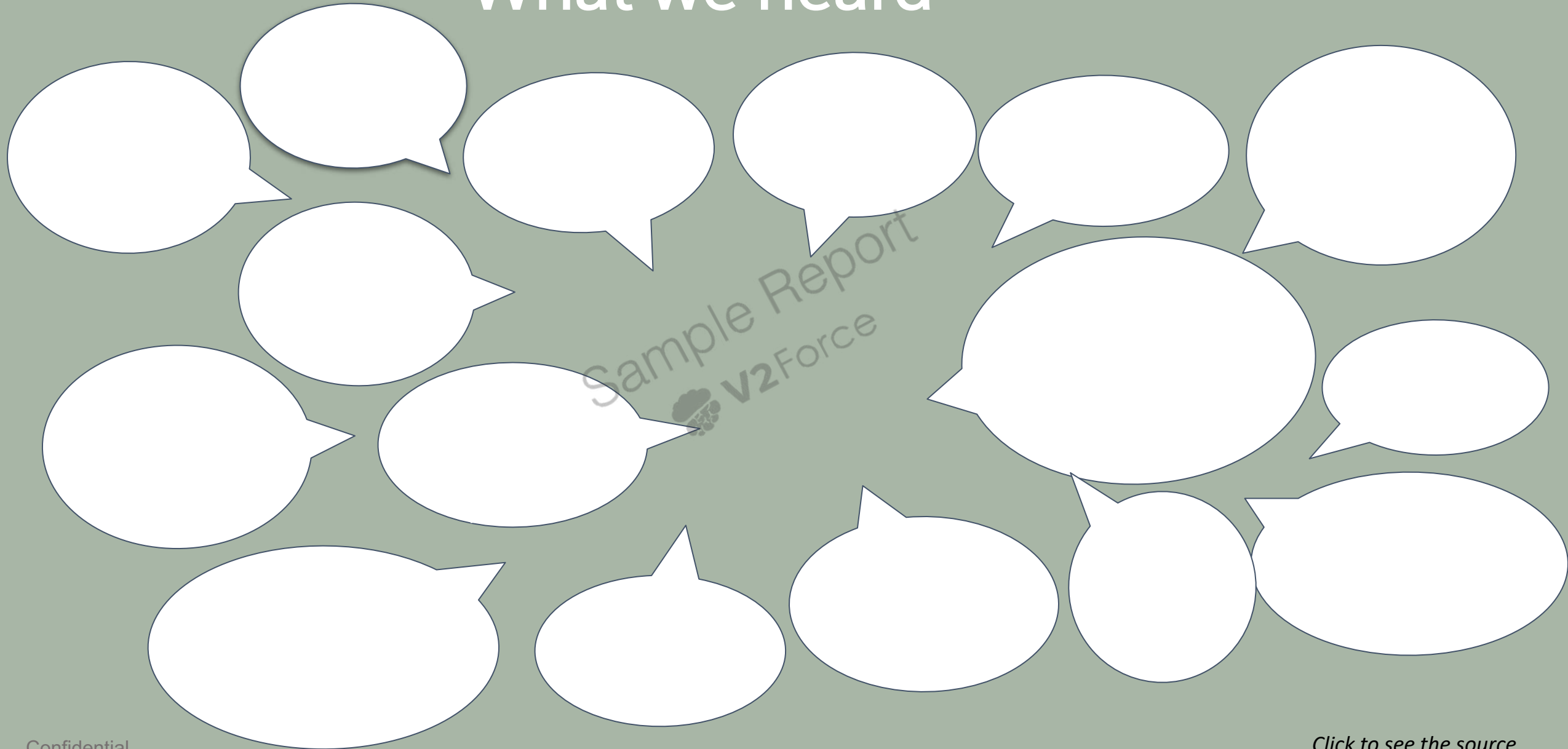


Develop improvements roadmap

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What we heard

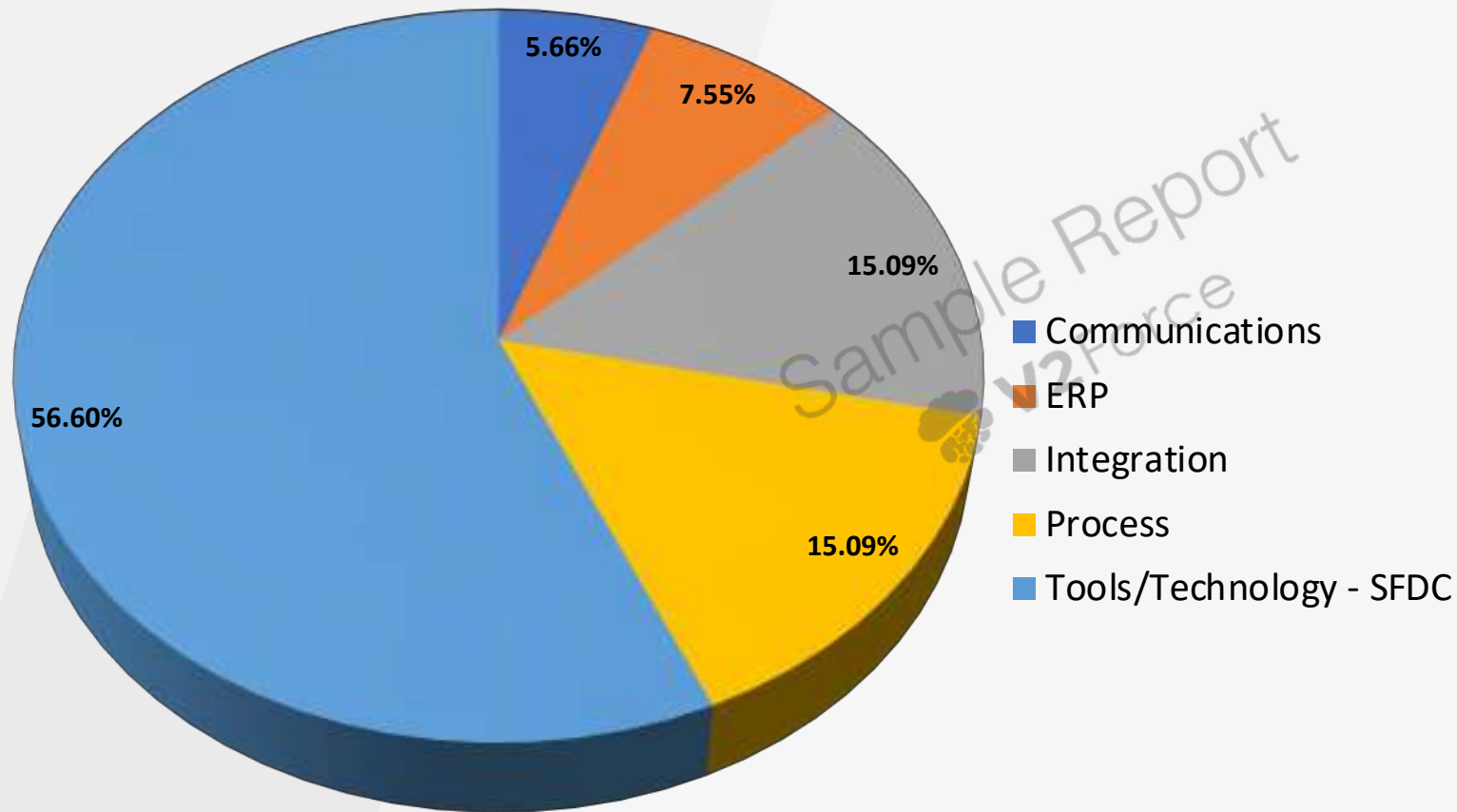


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Analysis of workshop comments

Where Do Challenges Exist?



What are the business challenges?

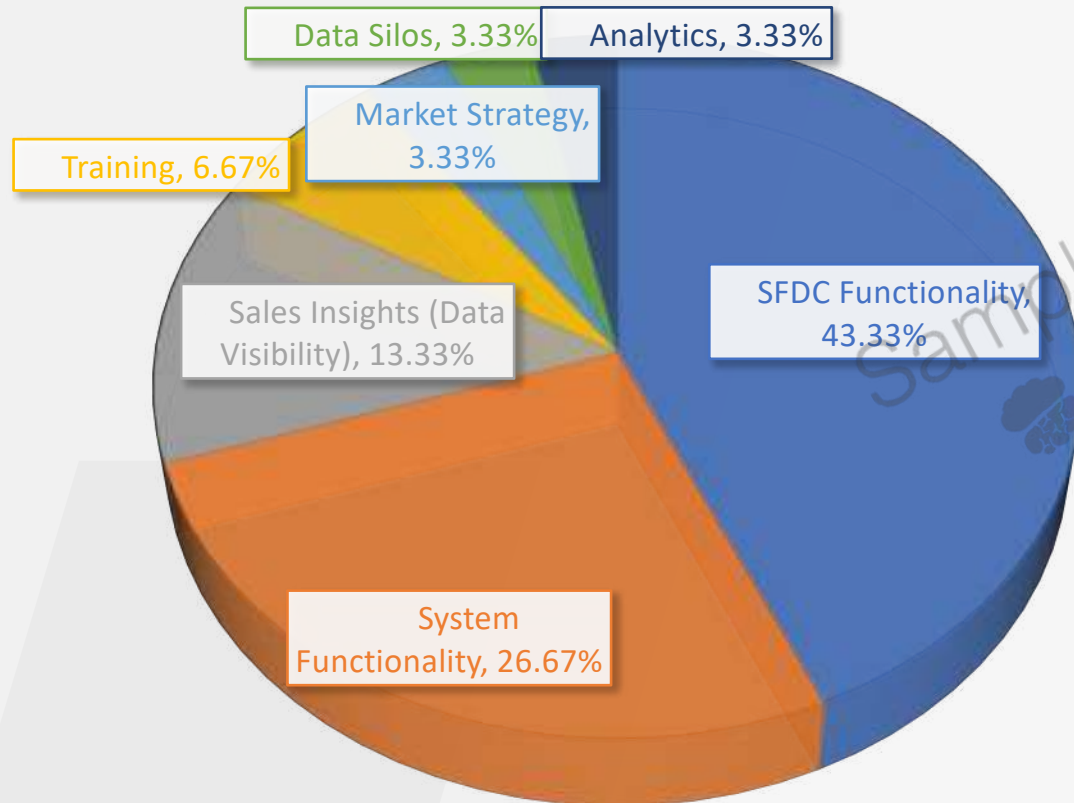
Comments were collected throughout the workshop. We then segmented challenges raised into four 'buckets' or key areas of concern -

- Tools/Technology (64%)
 - Salesforce
 - ERP
- Process (15%)
- Communications (6%)
- Integration (15%)

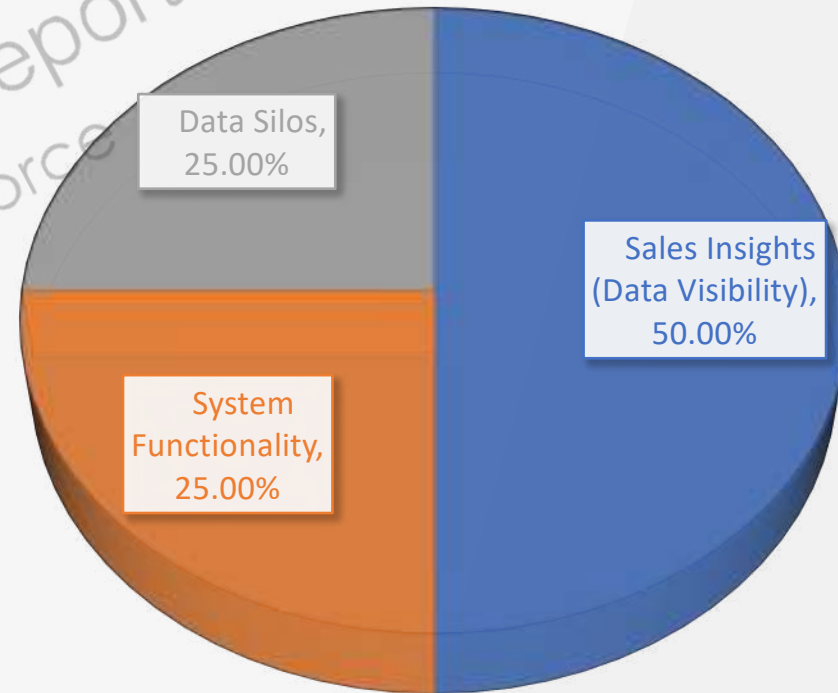


Tools Related Changes

TOOLS/TECHNOLOGY (SFDC) CHALLENGE DETAILS



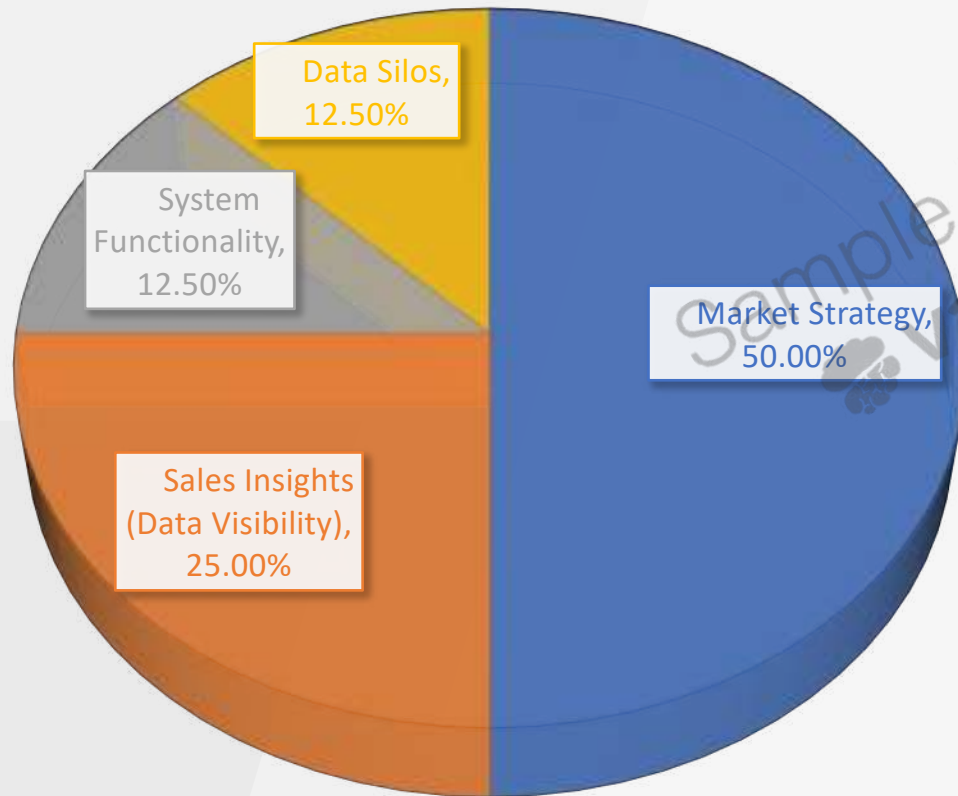
TOOLS/TECHNOLOGY (ERP) CHALLENGE DETAILS



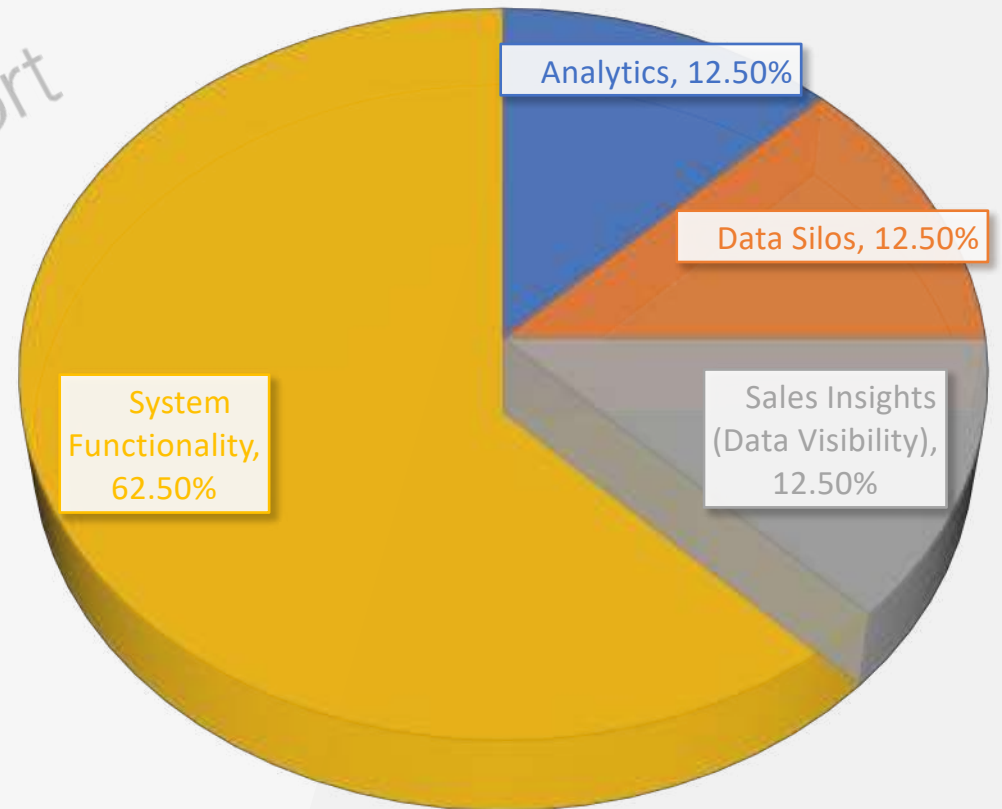


Process and Integration Challenges

PROCESS CHALLENGE DETAILS



INTEGRATION CHALLENGE DETAILS





Salesforce Org Health Check Findings

Salesforce Usage

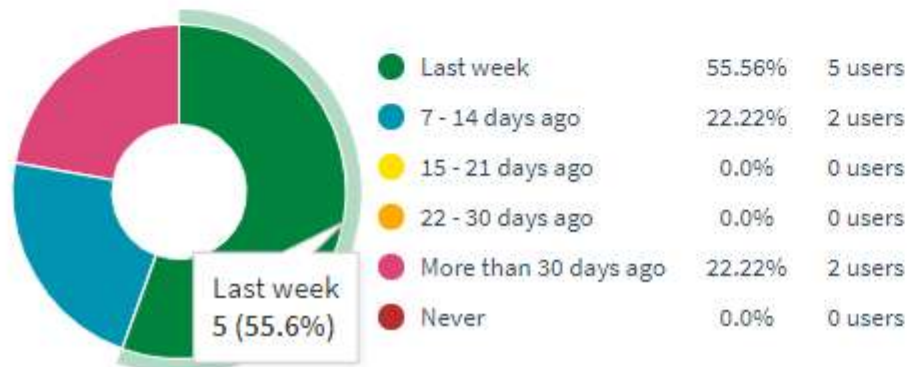
Chatter External User: 3



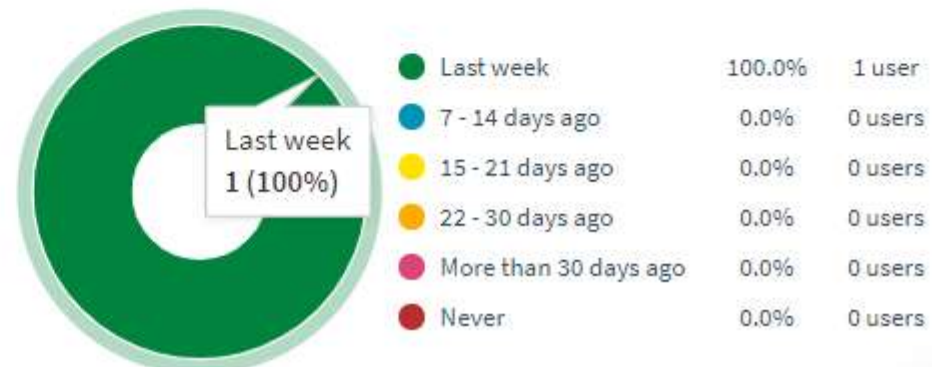
Standard User: 5



System Administrator: 9



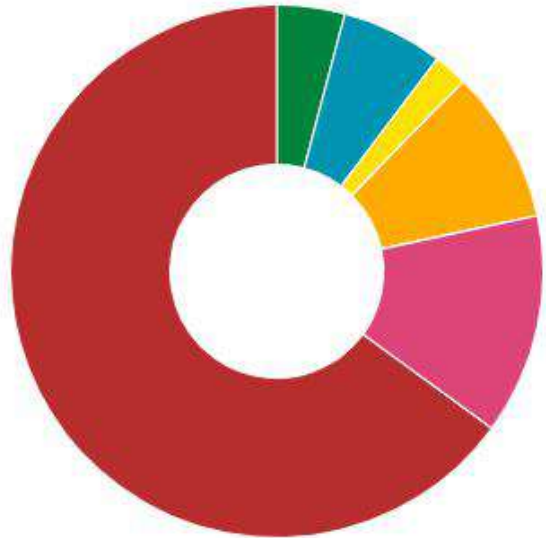
Sysadmin w Bulk Hard Delete: 1





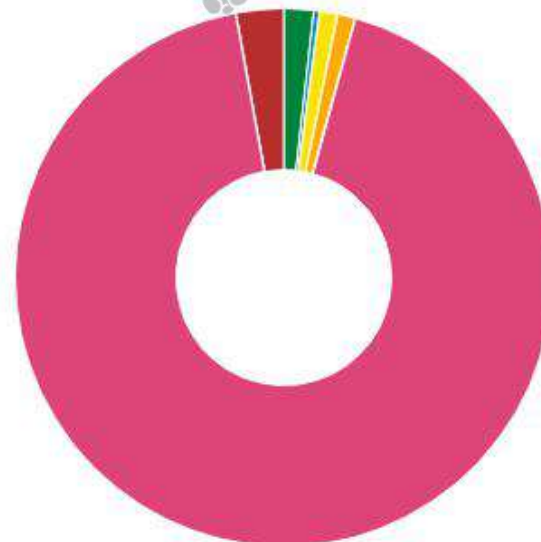
Salesforce Org Health Check Findings

Email Template and Report Usage



● Last 30 days	4.12%	4 email templates
● 31-90 days ago	6.19%	6 email templates
● 91-180 days ago	2.06%	2 email templates
● 181-365 days ago	9.28%	9 email templates
● Over a year ago	13.4%	13 email templates
● Never	64.95%	63 email templates

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● Last 30 days	1.79%	5 reports
● 31-90 days ago	0.36%	1 report
● 91-180 days ago	1.08%	3 reports
● 181-365 days ago	1.08%	3 reports
● Over a year ago	92.83%	259 reports
● Never	2.87%	8 reports

[Click to see the source](#)



Lightning Readiness - Report



Ready



Requires Some Review



Requires Your Attention



Requires a Thoughtful Rollout

Third-Party Computer-
Telephony Integration (CTI)

Tabs, Objects, and Related
Lists

Custom Buttons and Links-
JavaScript

Home Page and Sidebar
Components

Custom Buttons and Links-
URLs

Visualforce Pages

Reports and Dashboards
Sharing

AppExchange Packages

Solutions

Salesforce Knowledge

Activities Setup

Actions and Buttons

Report Builder

Salesforce Console

Web Browsers

Email Templates

My Domain

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Recommendations

Quick Win

Customer Service I

- Lightning Migration
- Service console setup
- Spam management
- Case Assignment rules improvement
- Better Dashboard & Reports
- Chatter Configuration
- Task & activity setup
- Call notes recording
- Training

4 Weeks

Customer Service II

- CTI Integration
- Social to Case

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3 Weeks

Sales team I

- Case allocation for Hospitality
- Outlook integration
- Email Tracking
- Email template
- Referral Management

4 Weeks



Recommendations

Larger Project

Sales Team - II

- Opportunity management
- Customer Journey

8 Weeks

Sales Team - III

- Email Studio
- Social Studio

8 Weeks

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Sample Report

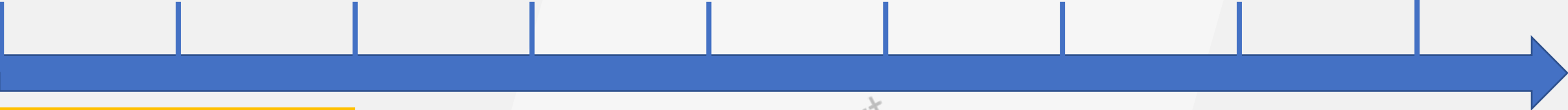
Solutions Demo

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Timeline (Tentative)



Week 0 Week 2 Week 4 Week 6 Week 8 Week 10 Week 12 Week 14 Week 16



Customer Service – I

Customer Service – II

Sales Team – I

Sales Team – II

Sales Team - III

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Implementation Project Process



Discovery

- **Project Kickoff** define project member's role and establish communication procedures
- **Workshop** conduct interviews with Key Stakeholders, build & validate Release plans
- **Solution Approach** finalize the solution approach & Deployment Plan
- **Backlog Development** creation of the backlog to capture epics & user stories

Design

- **Prioritize** Identify Minimum Viable Product (MVP)
- **Keep it Simple** Focus and Prevent Scope Creep
- **Document** Requirements, Design and Architecture

Build

- **Pre-Sprint Planning** analysis & plan, set up sandbox, code repository
- **Development Sprints** two-week development Sprints
- **Sprint Execution** configuration and unit testing
- **Sprint Review** present accomplishments and client acceptance

Test

- **Final Testing perform** end-to-end testing, fix issues and regression-test
- **Client Acceptance Testing** client testing & acceptance

Rollout

- **Go Live Planning** build checklist & changeset
- **Go Live Cutover** code freeze
- **Knowledge Transfer** - high level documentation



Appendix

- Workshop Notes
- Workshop finding analysis worksheet
- Salesforce Org Health check reports
- Lightning Readiness Report

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Thank You

Los Angeles | Silicon Valley | Seattle | Mumbai | Bangalore | Udaipur