



Salesforce assessment

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About the assessment



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Our assessment offers organizations insights into their Salesforce implementation's strengths and weaknesses. This information can be used to develop a roadmap for improving Salesforce adoption, optimizing business processes, and achieving higher ROI on Salesforce investments.

about the assessment -

The assessment evaluates various aspects of an organization's Salesforce implementation, including:



Salesforce configuration
& customization



Data quality &
management



User adoption &
engagement



Business process
automation



Integration with
other systems



Security & compliance

about the assessment –

As a Salesforce Partner since 2020, Resolute brings a wealth of experience in implementing and supporting complex Salesforce solutions across diverse industries.

- **Methodology** – We hold several discovery calls with IT and Business stakeholders from the organization, analyzing different technical and process documents.
- We request a Dev sandbox to be generated so we can review the technical design and object relationships.



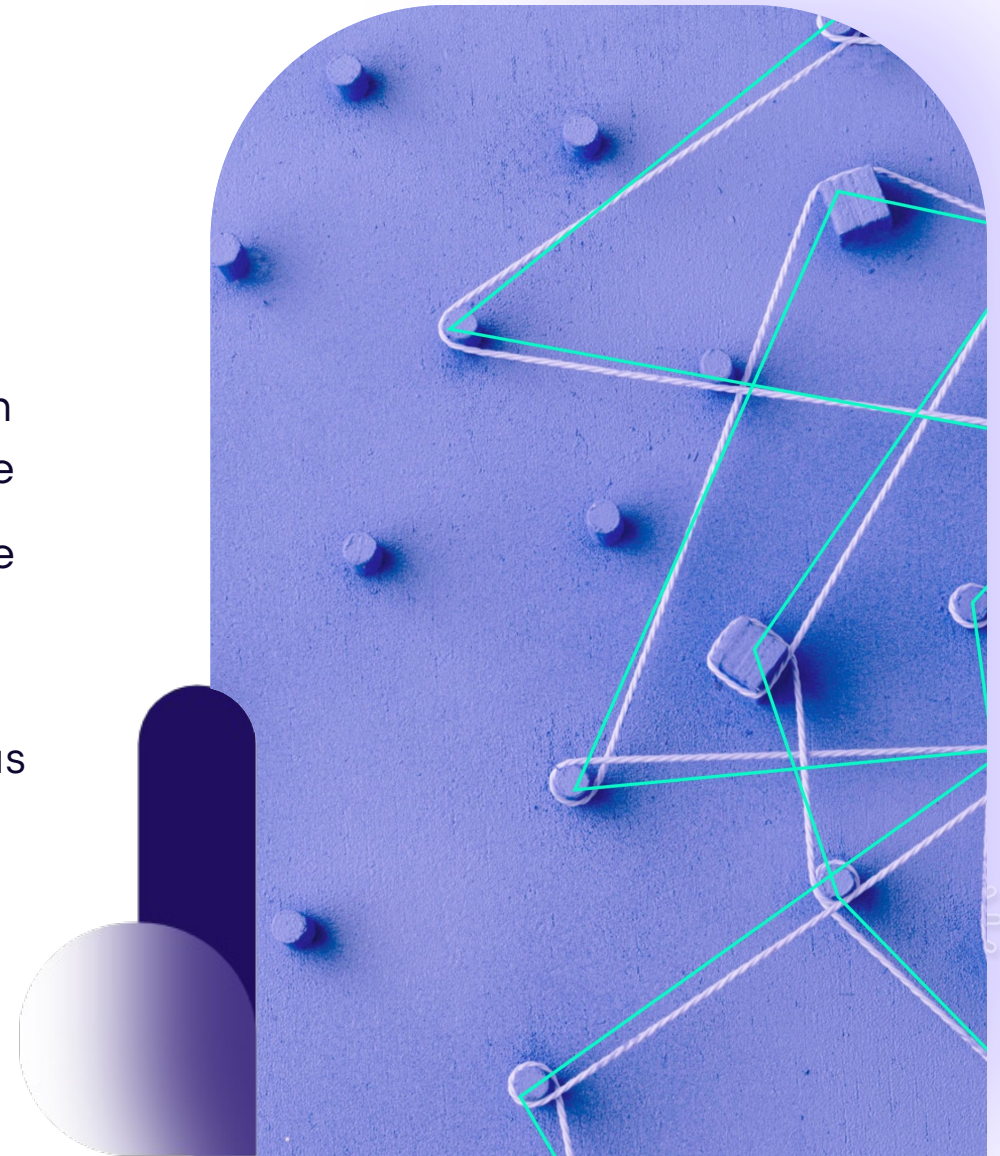


Key takeaways

key takeaways -

Example

- Annual Health check needs to be performed in the Salesforce organization
- Automations need to be modernized (workflow to Flow Builder)
- Change requests that are not related to the integration with the external ERP system can be deployed off-cycle
- Integration user with regular Salesforce licenses can be switched to the new free integration licenses released by Salesforce in Spring'23
- User experience can be improved by performing various sets of actions to speed up system performance (related lists, record types, dynamic actions, and page layouts)





How Resolute can support you



At Resolute, we recognize that Salesforce operates as a dynamic cloud-based solution, continuously undergoing changes. Similarly, user requirements, business operations, and data are constantly evolving as well. Therefore, it is essential to regularly assess the processes in your current Salesforce environment.

By doing so, you can unlock the full potential of your Salesforce platform, and gain confidence in its performance.

We can be a reliable ally for your organization providing expertise and support to ensure your long-term success.

how Resolute can support you -

We provide extensive monthly admin support where we can include the following services

✓ User management and maintenance

✓ Reporting

✓ Ongoing changes of the system

✓ Support with quarterly Salesforce releases

✓ Training of new employees


✓ Training documentation

✓ Troubleshooting of issues

✓ Mass data updates

✓ New product enhancements

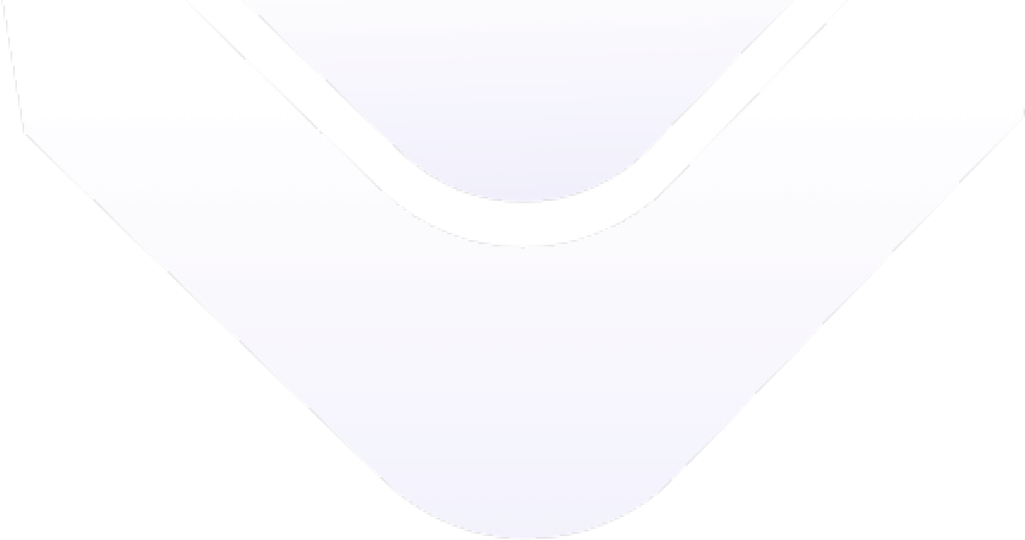
✓ Automations



Passion alone can't cut it. For passion to survive it needs structure. A why without how has little probability of success.



Simon Sinek



Thank you!



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Let's talk about your technology requirements.

Get in touch

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