



# Sample Salesforce Health Check Report - Findings & Recommendations



# Execution Methodology



**Workshop Goals**



**Key Workshop Findings**



**Org Health check Findings**



**Recommendations**



**Next Steps & Timeline**



**Appendix**

Sample Report  
 V2Force



# Workshop Goal



**Discuss current challenges & pain points**



**Map internal/external customer journeys**

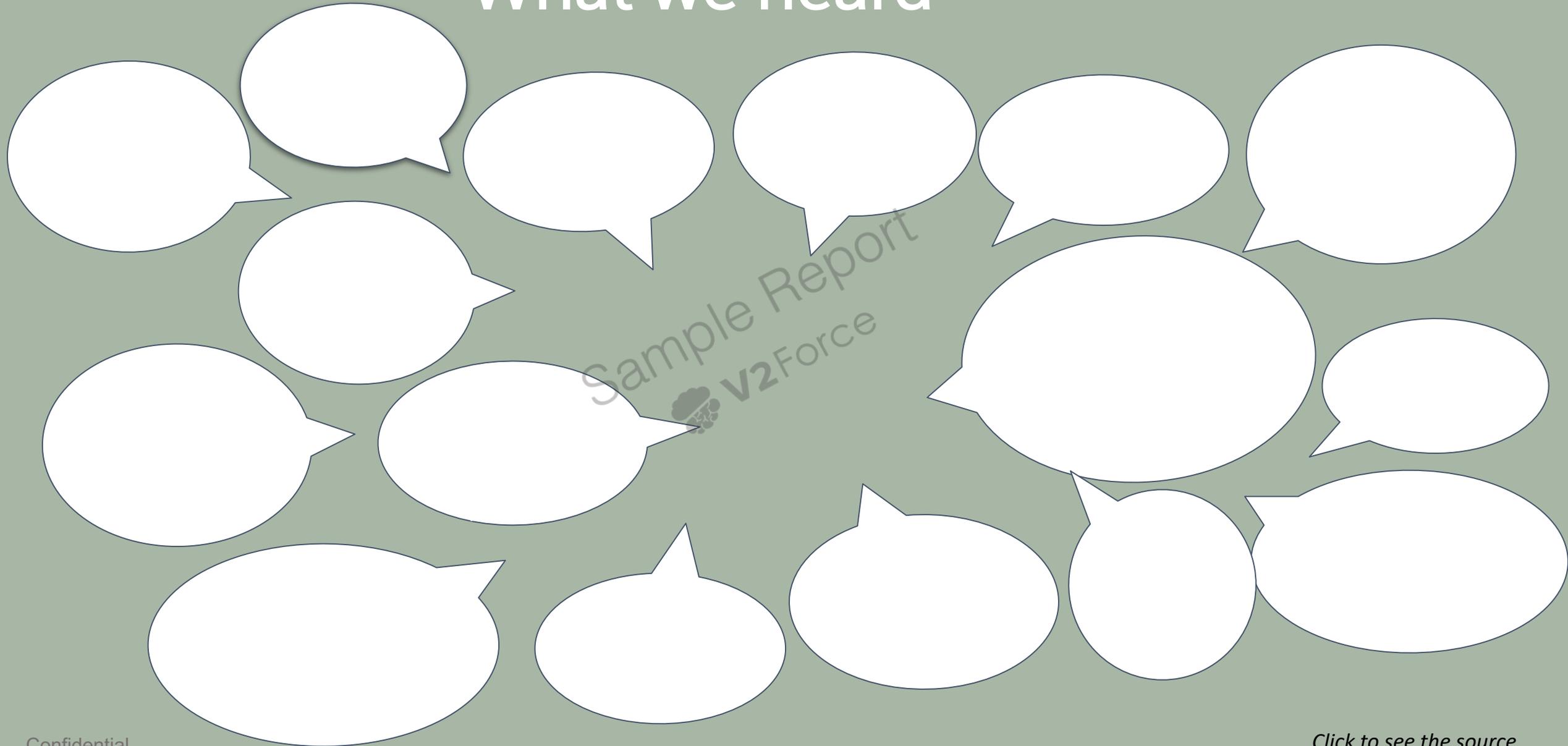


**Develop improvements roadmap**

Sample Report  
 V2Force



# What we heard

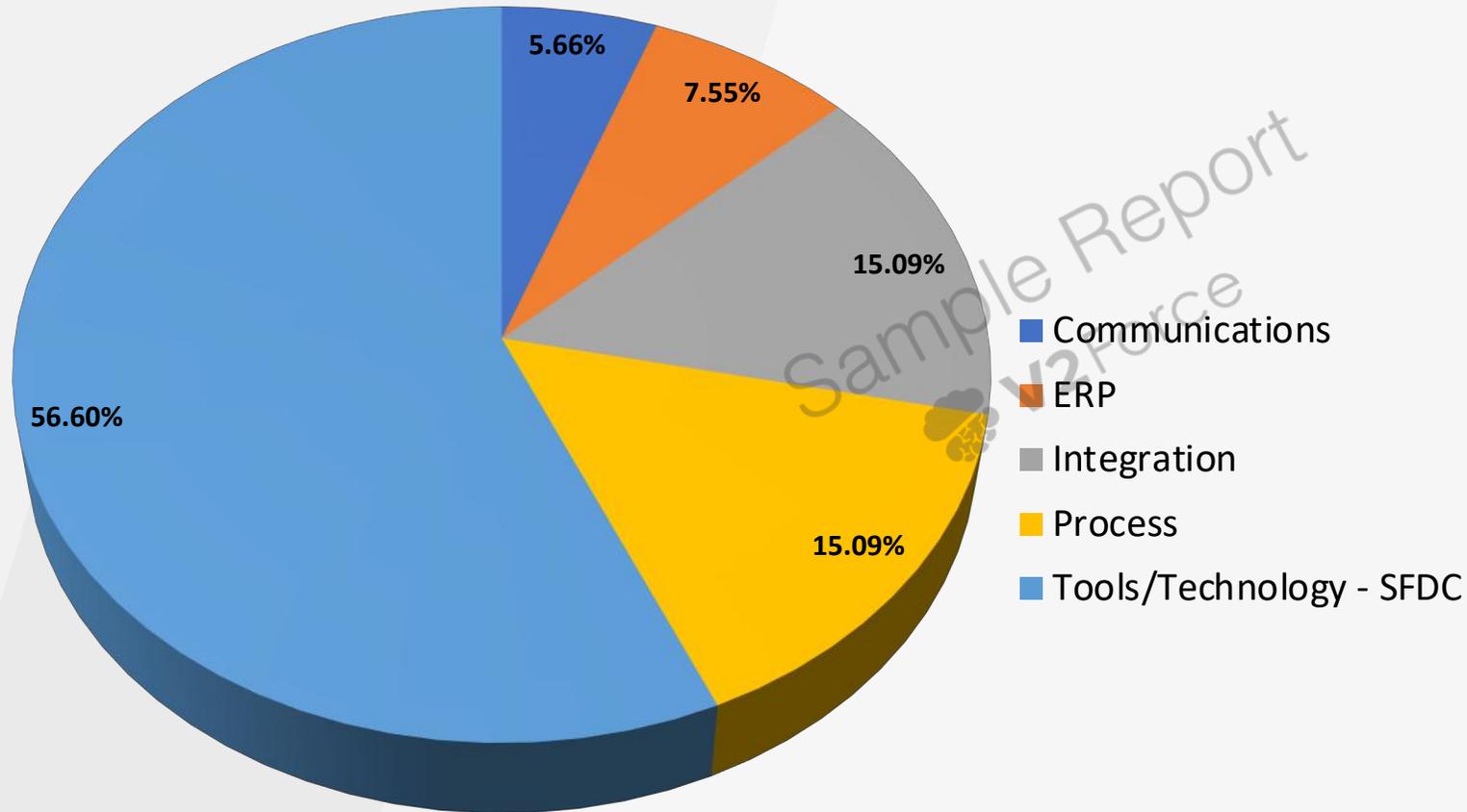


Sample Report  
V2Force



# Analysis of workshop comments

## Where Do Challenges Exist?



### What are the business challenges?

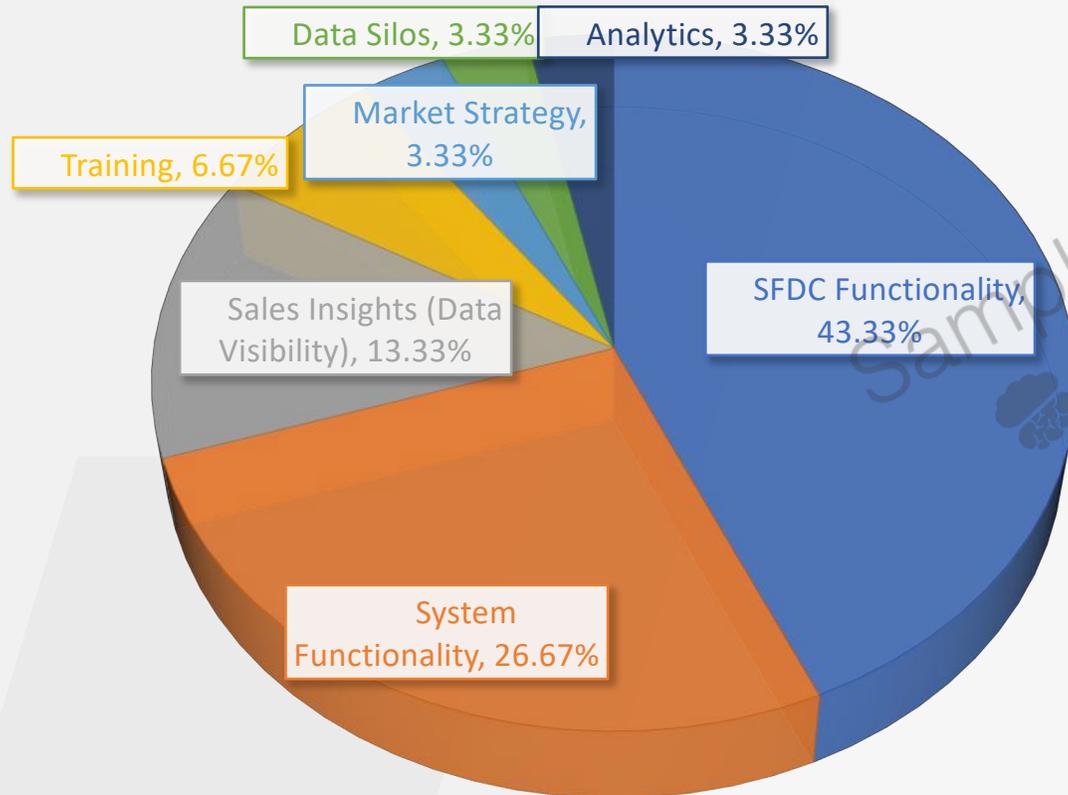
Comments were collected throughout the workshop. We then segmented challenges raised into four 'buckets' or key areas of concern -

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

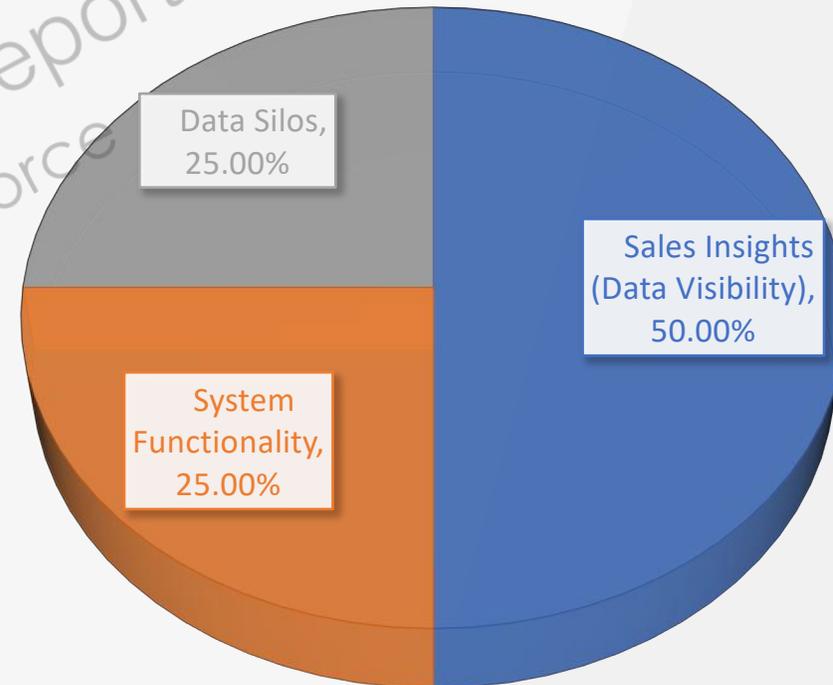


# Tools Related Changes

## TOOLS/TECHNOLOGY (SFDC) CHALLENGE DETAILS



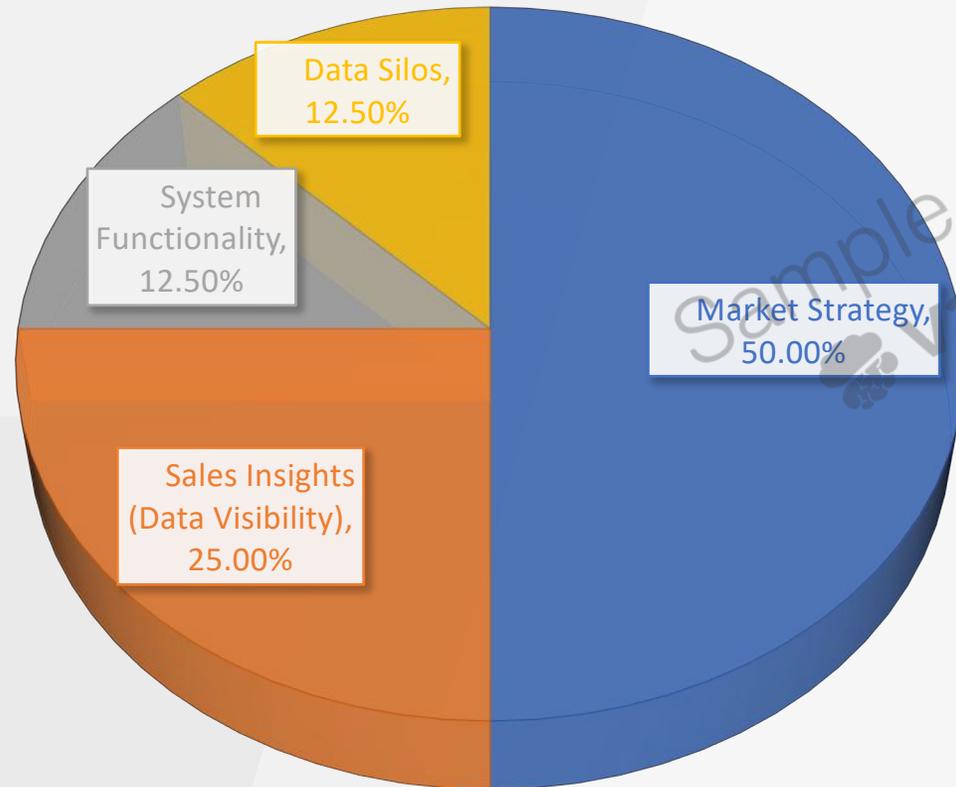
## TOOLS/TECHNOLOGY (ERP) CHALLENGE DETAILS



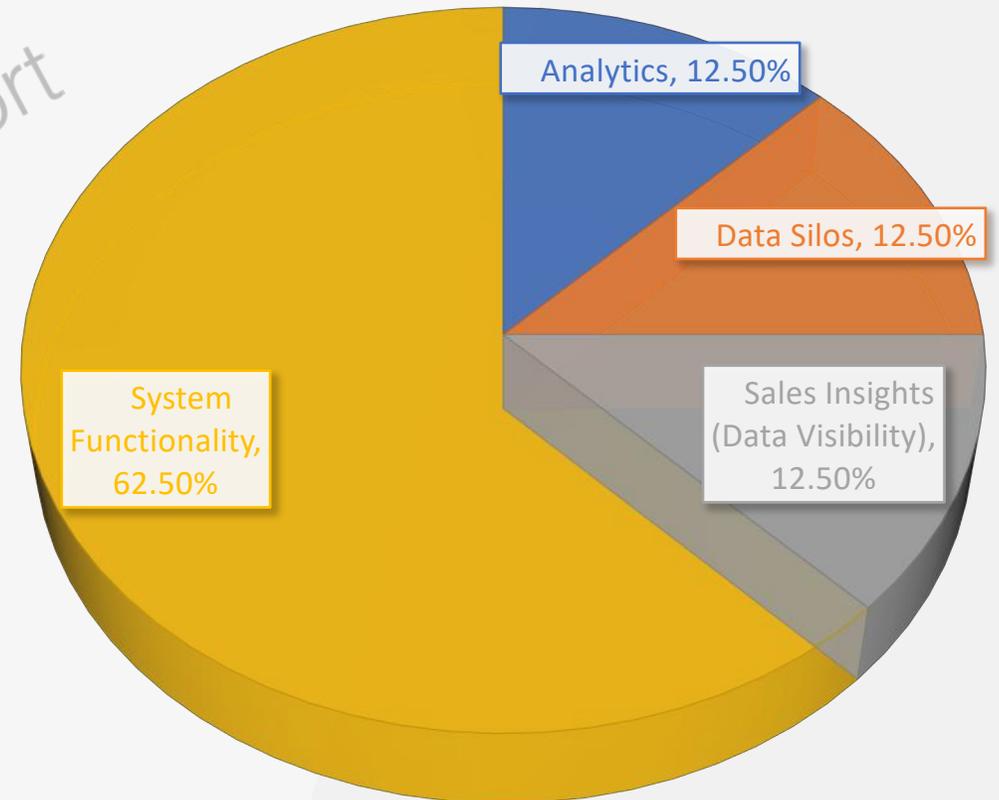


# Process and Integration Challenges

## PROCESS CHALLENGE DETAILS



## INTEGRATION CHALLENGE DETAILS

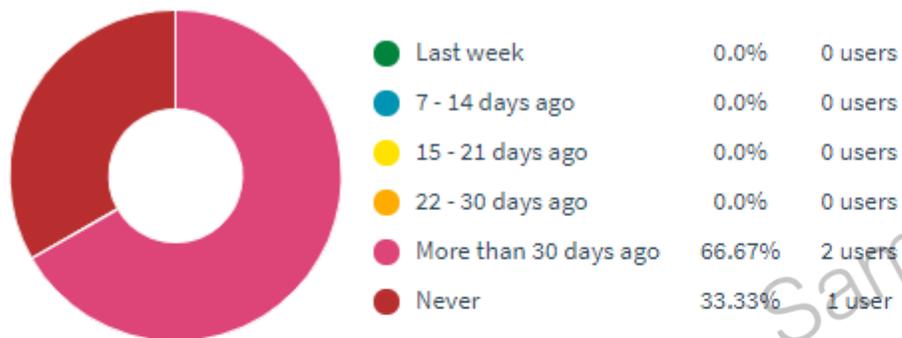




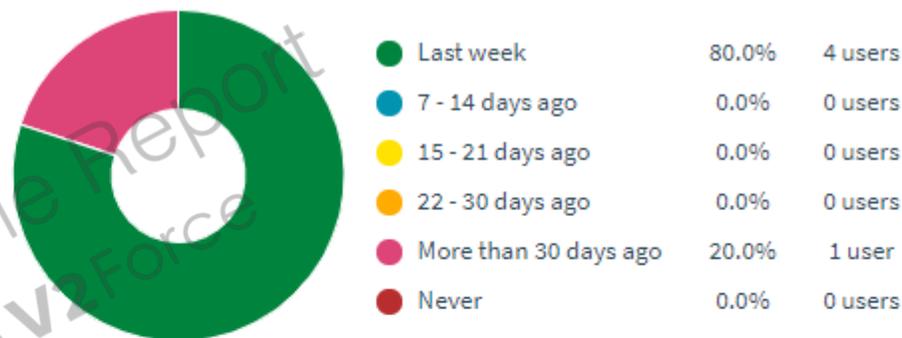
# Salesforce Org Health Check Findings

## Salesforce Usage

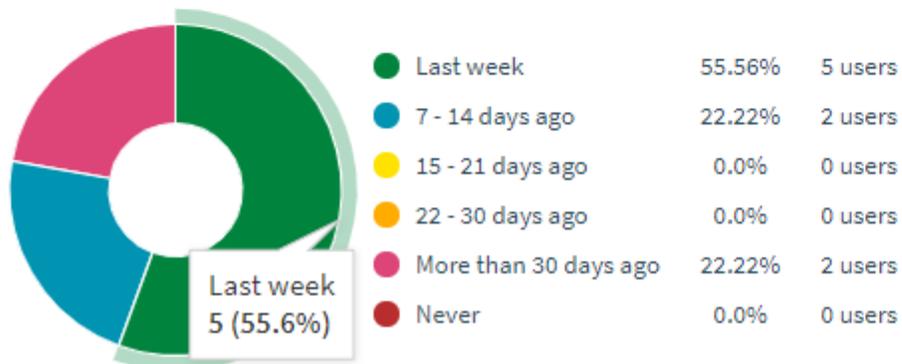
### Chatter External User: 3



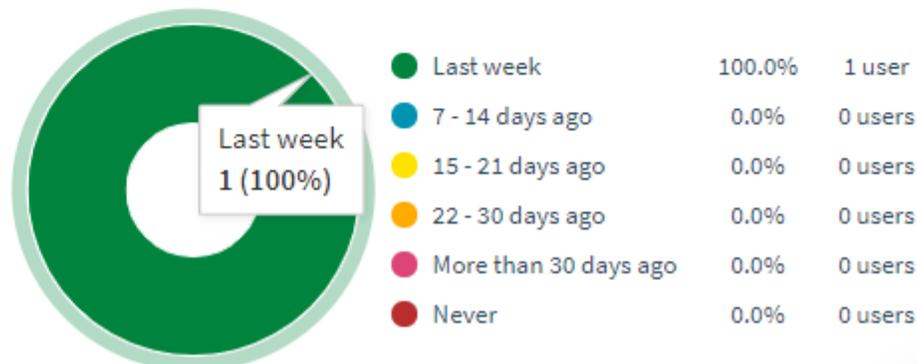
### Standard User: 5



### System Administrator: 9



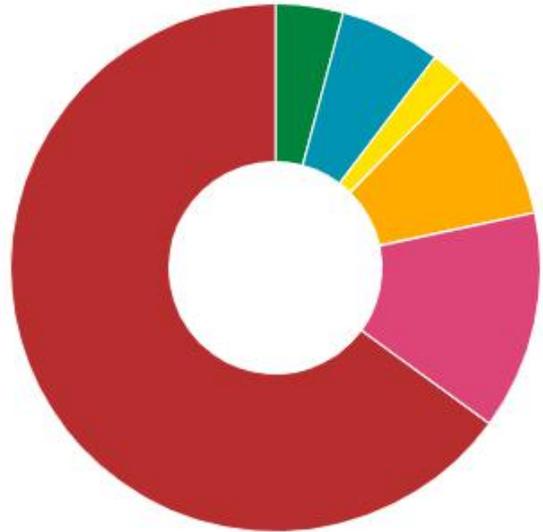
### Sysadmin w Bulk Hard Delete: 1





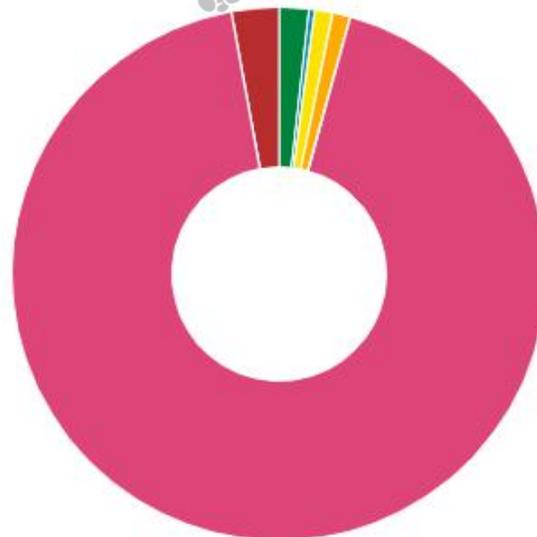
# Salesforce Org Health Check Findings

## 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

[Click to see the source](#)



● 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

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		

Sample Report  
V2Force



# 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

Sample Report  
V2Force

**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**

Sample Report  
 V2Force



# Solutions Demo

Sample Report  
V2Force

# 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**

Sample Report  
v2Force

# 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

Sample Report  
 V2Force



---

# Thank You

---

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