

# Optimizing Your Salesforce Ecosystem

Get the maximum ROI from your Salesforce investment

In today's experience economy, the needs of customer-centric organizations with Salesforce CRMs are changing rapidly with customers opting for a very customized platform. This introduces complexities in the organization, high maintenance, increase in technical debt with low features and less user adoption.

Many Salesforce customers struggle to maximize their ROI from their Salesforce investment as they fail to optimize the license and usage costs as well as fail to use Salesforce to its fullest potential

## Assess your salesforce ecosystem using Salesforce Health Check Assessment Framework

Movate based on its 18+ years of experience in customer experience management with end-to-end Salesforce capabilities developed a Salesforce Health Check Assessment Framework to quickly assess the Salesforce adoption, performance and cost optimization opportunities and recommend improvements and solutions.

## Movate's Salesforce Health Check Assessment Framework

The Framework helps assess the Salesforce ecosystem for:



Slow performance due to heavy platform customization and configuration for required features



High subscription costs for features not used and missing out on the latest upgrades



Low feature adoption as end users are unaware of right features to use



User Access Security vulnerabilities

## Key Assessment Areas



## Benefits

- ▶ Identify areas to reduce technical debt and unused customization
- ▶ Reduce costs by freeing up unused licenses and metadata
- ▶ Improve adoptions by understanding reasons for low usage and adoption
- ▶ An independent assessment highlights issues and bottlenecks in current Salesforce ecosystem
- ▶ Create a strategy for continuous Salesforce optimization and success



# Our 5-day Salesforce Health Check Assessment

## Collaborative approach to identify optimization and improvement areas

Our certified Salesforce consultants will collaborate with your key stakeholders to conduct a zero cost standard assessment for a week or more depending on the complexity of the organization.

### ACTIVITIES

- Check Salesforce Compliance**
  - Identify subscription renew cycle, Products Purchased, Purchased Licenses vs Usage
  - Identify potential pending upgrades and subscription risks
- Review Salesforce Health**
  - Monitor System Usage, Technical Debt & Storage
  - Perform health check & generate reports using tools like CheckMarks, Elements
- Assessment Report**
  - Develop assessment report & interim plan with recommendations on license cost optimization, feature configuration / adoption & code quality
  - Validate, align & sign off with stakeholders

### KEY STAKEHOLDERS FOR ASSESSMENT

#### INCLUDE THE FOLLOWING ROLES -

- Salesforce Practice Director / Manager
- Salesforce Techno-functional Manager
- Software Development Director / Manager
- Key Software Architects

#### CONSIDER INCLUDING, AS NEEDED -

- Key Business Stakeholders
- Product Managers
- PIMO Leaders / Program Managers
- Other key members (Implementation tech leads)

### ILLUSTRATIVE DELIVERABLES & OUTCOMES

You will get a report which outlines the current state of your Salesforce instance and provides actionable steps you can take to optimize costs, improve adoption and performance.

#### Reports based on 5-day assessment

##### Data Model

- Objects, fields
- Validation rules, workflows, approvals

##### Custom Development

- Apex classes
- Triggers
- Visualforce pages/ components

##### Managed Package Detail

- Data usage per package
- Configuration and customization statistics

##### Security Model

- Roles, Profiles, Permission Sets, and Groups
- With last login dates for member users
- The "Login Ratio"

Contact us for this assessment at zero cost

## About Movate

Movate, formerly CSS Corp, is a digital technology and customer experience services company committed to disrupting the industry with boundless agility, human-centered innovation, and a relentless focus on driving client outcomes. It helps ambitious, growth-oriented companies across industries stay ahead of the curve by leveraging its diverse talent of over 12,000 full-time Movators across 20 global locations and a gig network of thousands of technology experts across 60 countries, speaking over 100 languages. Movate has emerged as one of the most awarded and analyst-accredited companies in its revenue range.