

Salesforce Performance Check In

Engagement Overview

Alianz Salesforce Performance Check In engagement is for organizations committed to the premier customer success platform and looking to get more out of their Salesforce investment.

What

360 degree review of your Salesforce instance with emphasis on:

- Business Process Fit
- User Experience in Sales / Marketing / Customer Support / Service
- Executive Visibility and Experience
- Technical Risks
- Planning and Roadmap

When

- 5 days

Where

- In person or remote

Why

- Better connect teams and processes for greater efficiency
- Comprehensive discovery focused on business improvement
- Understand Existing Risks and Challenges
- Evolve Salesforce solution for current and future business needs



Business Impact Document

- Overview of existing business process challenges
- Overview of existing user experience and adoption challenges
- Overview of Salesforce current state
- High-level gap-fit analysis
- Recommended solutions

Salesforce roadmap presentation

- Summary of business needs
- Recommended solutions
- High level Implementation Plan
- Proposed Timelines and Estimates

Salesforce Performance Check In

Engagement Scope

DAY

1

Engagement Planning

- Kick Off and Goal Setting Meeting
- Executive Interviews
- High Level Business Process Overview

DAY

2

Functional Overview

- High Level Business Process Overview (continued)
- Power User Interviews
- Reporting Review
- User Experience Review
- Training Needs Review

DAY

3

Technical Overview

- Solution Architecture Review
- Infrastructure Review
- Licensing Review
- Customization Overview
- Reporting Overview
- Technical Risk Assessment

DAY

4

Deliverables

- Business Impact Document (audit summary)
- Salesforce Roadmap (recommended projects / estimates / timelines)

DAY

5

Presentation

- Audit Findings Presentation
- Roadmap Presentation

Salesforce Performance Check In

Guidelines

Targeted to implementations of 20 – 350 users

Ideal for Professional License and up

Focused on business needs with emphasis on either of:

- General Salesforce experience
- Marketing
- Sales
- Service
- Operations

Additional Services

Salesforce Functional Services

- Training
- User Experience Development & UX Branding
- Data Migration
- APEX & Visual Force Development
- Third Party Integrations

Salesforce Deployment

- Sales Cloud
- Service Cloud
- Marketing Cloud
- Chatter
- Communities

Enterprise Services

- Solution Architecture
- Shared Services Enablement
- Business Intelligence & Corporate Performance Management