WHY OPTIMIZE

Over time, every database requires attention to keep up with changes in business process, technology advancements, and evolving organizational goals. We'll help you assess and analyze the state of your CRM, outline it's strengths and weaknesses, determine solutions, and put them in place.

ASSESSMENT OUTCOMES

The outcomes of your assessment are based on your level of engagement:

- User story documentation
- Configuration workbook
- SWOT analysis
- Current CRM and solution integration diagram
- Proposed CRM and solution integration diagram
- Implementation timeline
- Statement of work including deliverables and hours estimate

LEVELS OF ENGAGEMENT

Tier One - Targeted
Address fundamental adjustments to your Salesforce CRM. This includes ONLY native adjustments such as workflows, triggers and some potential changes in business process. No coding, integration or data migration involved.

Tier Two - Strategic
 Tier 1 plus select enhancements related to applications. Some coding is likely to take place.

Tier Three - Comprehensive
Tier 2 plus architectural changes that may require native adjustments, work flow process, data migration, application integration, third party integration, etc.

LET'S TALK