



# Salesforce Org ACT Health Assessment

## Assess · Calibrate · Transform

Increase revenue and customer satisfaction by ensuring your Salesforce accelerates—not stalls—your business goals.

## Why ACT Now?

### Duplicate & Orphaned Data

- Heavy duplication across Accounts, Leads, Opportunities, and Cases is clogging your system. Orphaned records further confuse users and distort reporting.

### Weak Security Configurations

- Overly broad org-wide defaults, profiles, and permission sets expose sensitive data. Inadequate access control undermines compliance and governance.

### Performance Bottlenecks

- Unarchived high-volume records like Cases, Opportunities, and Emails degrade performance. The result—slower load times and limited scalability.

### Broken Account Structures

- Poorly maintained parent-child relationships and scattered hierarchies lead to pipeline blind spots. Teams struggle to get a unified customer view.

### Outdated Processes & Manual Forecasting

- Legacy automations not migrated to Flow slow execution. Forecasting remains manual, missing the insights and accuracy of Collaborative Forecasting.

If any of this sounds familiar, it's time to ACT, literally!

# Program Snapshot

Phase	Week 0	Week 1	Week 2	Week 3	Week 4
ASSESS	<ul style="list-style-type: none"> <li>Interviews, documentation review, automated scan</li> <li>Current-state scorecard &amp; risk log</li> </ul>				
CALIBRATE			<ul style="list-style-type: none"> <li>Gap analysis &amp; quick-win tuning</li> <li>License &amp; governance review</li> <li>ACT Gap &amp; ROI Matrix</li> </ul>		
TRANSFORM				<ul style="list-style-type: none"> <li>Roadmap design &amp; executive read-out</li> <li>Costed next-step proposals</li> <li>Detailed Exec Brief + 6–12-month action plan</li> </ul>	

**Note:** The timelines for transformation may vary based on the number of Salesforce clouds that are included as part of ACT assessment.

# Assessment Areas & Deliverables

## What We Assess

- Architecture & Data Model**  
 Growth-ready design and governor limit optimization.
- Security & Compliance**  
 Role hierarchy, sharing rules, and audit readiness.
- Platform Customization**  
 Config vs. code usage, AppExchange, and DevOps maturity.
- Integration Strategy**  
 External systems, API load, and connector health.
- Reporting & Forecasting**  
 Dashboard gaps and underused Collaborative Forecasting.
- Adoption & UX**  
 Login trends, Lightning layouts, and training needs.

## You'll Receive

- Detailed Executive Brief**  
 C-suite-ready insights and KPIs with strategic depth
- ACT Gap & Risk Matrix**  
 Effort, impact & ROI scored for every finding
- Transformation Roadmap**  
 Sequenced quick wins + strategic initiatives
- Fixed-price Implementation Proposal**  
 Seamless path from diagnosis to remediation

**Note:** Covers active Salesforce clouds only. Change requests and third-party fixes are out-of-scope to keep ACT focused.



# Ready to Connect?

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## Maximize Velocity, Minimize Risk

Comprehensive health checks, security hardening, and a bespoke transformation plan—crafted to keep your Salesforce agile, secure, and scalable.

## Get Started with R Systems Today

Please reach out to us using the following contact information:

Email: [info@rsystems.com](mailto:info@rsystems.com)

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