



FOCUSED ENGAGEMENT

Salesforce Health Check

A focused assessment that identifies risk, quick wins, and the right priorities for your Salesforce environment.

\$2,000 FIXED FEE	7-10 days DURATION	Up to 3 INTERVIEWS	Remote DELIVERY

When this engagement is useful

Unclear priorities Your team knows Salesforce needs attention but lacks a shared, evidence-based roadmap.	Untrusted data and reports Duplicates, inconsistent fields, or incomplete reporting reduce confidence in decisions.
Automation and process gaps Flows, manual workarounds, and fragmented processes create avoidable effort and risk.	Administrator transition A departing administrator or inherited org creates documentation, access, and continuity concerns.

Assessment areas

- Business alignment and stakeholder priorities
- Configuration, objects, fields, record types, and page layouts
- Security, permissions, roles, and access patterns
- Flows, approvals, automation, and maintainability
- Data quality, duplicate management, and governance
- Reports, dashboards, integrations, documentation, and adoption



What you receive

Deliverable	What it provides
Executive findings summary	A concise view of strengths, risks, and priority decisions.
Issue and risk register	Documented observations organized by impact and urgency.
Quick-win recommendations	Practical improvements that can be completed with limited effort.
Prioritized roadmap	Sequenced recommendations for near-term and longer-term action.
High-level estimate	A budgetary view of likely implementation effort.
60-minute findings session	Leadership walkthrough, questions, and recommended next steps.

Simple commercial terms

50% due at initiation and 50% upon delivery. The engagement includes up to three stakeholder interviews and requires appropriate Salesforce access and a designated client contact.

Ready to get clarity?

Contact info@prudenceb2b.com to schedule an introductory conversation or visit www.prudenceb2b.com.