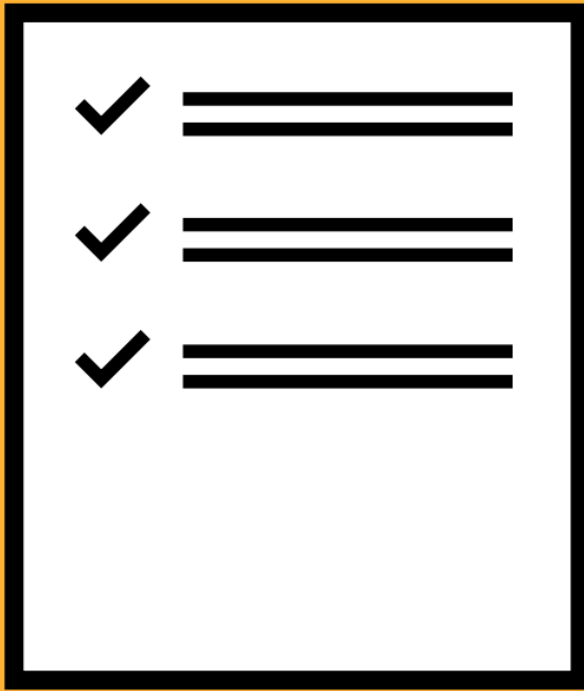


The comprehensive checklist for identifying gaps in your Salesforce solution.

Am I fully utilizing the capabilities of Salesforce?



Am I fully utilizing the capabilities of Salesforce?

A list of questions to ask yourself about your Salesforce implementation.

If you answered "no" to any of these questions, then you may need help with maintaining, setting up, or developing your Salesforce solution.

Contact us to learn more about how we can help you get the most out of your Salesforce system.

Comprehensive Implementation:

- Have you implemented all relevant Salesforce features and modules that align with your business needs?
- Are you leveraging the full capabilities of the Salesforce platform, including Sales Cloud, Service Cloud, Marketing Cloud, or other specialized solutions?

User Adoption:

- Are your users actively and consistently utilizing Salesforce?
- Do you have a high user adoption rate across your organization?
- Are users trained and educated on how to effectively use Salesforce for their respective roles and responsibilities?

Customization and Configuration:

- Have you tailored Salesforce to meet your specific business requirements?
- Have you customized page layouts, fields, objects, and workflows to optimize your processes?
- Are you utilizing automation tools like Flows to streamline and automate your business workflows?

Data Management:

- Is your data properly organized?
- Are you regularly cleaning and maintaining data quality?
- Are your data visibility and security settings working for you?

Reporting and Analytics:

- Are you utilizing Salesforce reporting and dashboard features to gain insights into your business performance?
- Have you configured reports and dashboards to monitor key metrics and KPIs?
- Are you utilizing advanced analytics tools like Einstein Analytics to uncover deeper insights from your data?

Integration with External Systems:

- Have you integrated Salesforce with other critical systems in your technology stack, such as ERP, marketing automation, or customer support platforms?
- Are you maximizing the benefits of these integrations to ensure seamless data flow and improved cross-functional processes?

Continuous Improvement and Innovation:

- Do you regularly assess and evaluate your Salesforce solution to identify areas of improvement and optimization?
- Are you staying updated with new Salesforce features, releases, and best practices?
- Do you actively seek feedback from users and stakeholders to drive innovation and enhance your Salesforce implementation?
- Is your Salesforce implementation designed to accommodate future growth and scalability?

If you have any questions or are interested in learning more about Salesforce or our services, please contact us

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