



# CRM Health Check: Unlocking Salesforce Performance

August 22, 2024



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**mazars**

# Global Presence

**Top 10**

Global Network\*

**\$5bn**

Combined Revenue (2023)

**100+**

Combined Countries & Territories

**400+**

Combined Offices & Locations

**1,800+**

Combined Partners

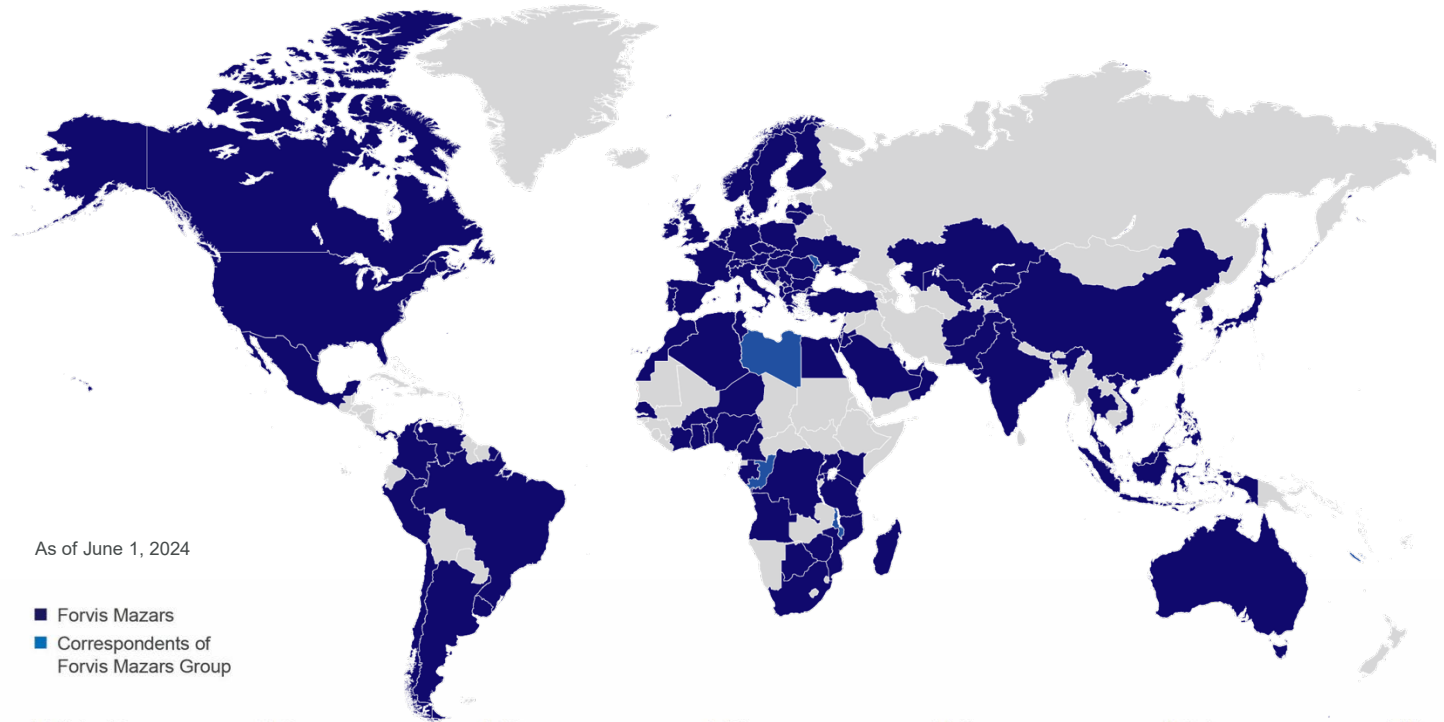
**40,000+**

Combined Employees

\* Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS \$1.7bn (€1.6bn), Mazars (expected) \$3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



As of June 1, 2024

- Forvis Mazars
- Correspondents of Forvis Mazars Group

- |                          |  |              |              |                   |                |                        |
|--------------------------|--|--------------|--------------|-------------------|----------------|------------------------|
| ■ Afghanistan            | ■ Cameroon                               | ■ France     | ■ Korea      | ■ Morocco         | ■ Qatar        | ■ Togo                 |
| ■ Albania                | ■ Canada                                 | ■ Gabon      | ■ Kosovo     | ■ Mozambique      | ■ Romania      | ■ Tunisia              |
| ■ Algeria                | ■ Cayman Islands                         | ■ Germany    | ■ Kuwait     | ■ Netherlands     | ■ Rwanda       | ■ Türkiye              |
| ■ Angola                 | ■ Chile                                  | ■ Ghana      | ■ Kyrgyzstan | ■ New Caledonia   | ■ Saudi Arabia | ■ Uganda               |
| ■ Argentina              | ■ China                                  | ■ Greece     | ■ Latvia     | ■ Niger           | ■ Senegal      | ■ Ukraine              |
| ■ Australia              | ■ Colombia                               | ■ Hong Kong  | ■ Lebanon    | ■ Nigeria         | ■ Serbia       | ■ United Arab Emirates |
| ■ Austria                | ■ Congo                                  | ■ Hungary    | ■ Libya      | ■ North Macedonia | ■ Singapore    | ■ United Kingdom       |
| ■ Bahrain                | ■ Côte d'Ivoire                          | ■ India      | ■ Lithuania  | ■ Norway          | ■ Slovakia     | ■ United States        |
| ■ Belgium                | ■ Croatia                                | ■ Indonesia  | ■ Luxembourg | ■ Oman            | ■ Slovenia     | ■ Uruguay              |
| ■ Benin                  | ■ Cyprus                                 | ■ Ireland    | ■ Madagascar | ■ Pakistan        | ■ South Africa | ■ Uzbekistan           |
| ■ Bermuda                | ■ Czech Republic                         | ■ Israel     | ■ Malawi     | ■ Palestine       | ■ Spain        | ■ Venezuela            |
| ■ Bosnia and Herzegovina | ■ Democratic Republic of the Congo (DRC) | ■ Italy      | ■ Malaysia   | ■ Panama          | ■ Sweden       | ■ Vietnam              |
| ■ Botswana               | ■ Denmark                                | ■ Japan      | ■ Malta      | ■ Peru            | ■ Switzerland  | ■ Zimbabwe             |
| ■ Brazil                 | ■ Egypt                                  | ■ Jordan     | ■ Mauritius  | ■ Philippines     | ■ Taiwan       |                        |
| ■ Bulgaria               | ■ Finland                                | ■ Kazakhstan | ■ Mexico     | ■ Poland          | ■ Tanzania     |                        |
| ■ Burkina Faso           |  | ■ Kenya      | ■ Moldova    | ■ Portugal        | ■ Thailand     |                        |

# Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations
- Designing & implementing modern operational systems
- Reviewing new business-facing technologies
- Leveraging existing investments in legacy technologies
- Integrating data solutions



# Business Technology Services

## ERP

- Microsoft Dynamics 365
  - Enterprise
    - Finance
    - Supply Chain
    - Commerce
  - SMB
    - Business Central
    - Dynamics GP
- NetSuite
- Sage & Sage Intacct

## CRM

- Microsoft Dynamics 365
  - Sales
  - Service
  - Marketing
- Salesforce
- Marketing Automation

## Advanced Technology

- Insights
  - Microsoft Power BI
  - Solver Planning & Analysis
- Automation
  - Microsoft Power Platform
  - Robotic Process Automation (RPA)
- App Development

 **Managed Services** for business applications, IT, & cyber support.

Microsoft Partner

ORACLE NETSUITE  
Solution Provider

Sage Partner

salesforce PARTNER

solver

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# Today's Presenters

CRM Practice

**“Our team is focused on delivering an Unmatched Client Experience<sup>®</sup> on every engagement.”**

– Chad Back, Partner



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# Objectives

1. Define how to set key performance indicators related to data quality, modifications, customization, & integrations
2. Identify how to review your CRM system's configuration, including what's "core" & what's customized
3. Discuss how to perform a data audit, assessing data quality, duplicate records, missing information, & inconsistencies



# What Is a Health Check?

Assessing the overall well-being of your Salesforce environment.

## Key Components

- Process Evaluation
- Best Practice Recommendations
- Productivity Boost





# When to Perform a Salesforce Health Check

- Declining User Adoption Rate
- Business Progress Not Meeting Expectations
- Reliance on Manual Processes Despite Salesforce Implementation
- Complexity & Difficulty in Following Processes
- Challenges in Keeping Up With Salesforce Updates



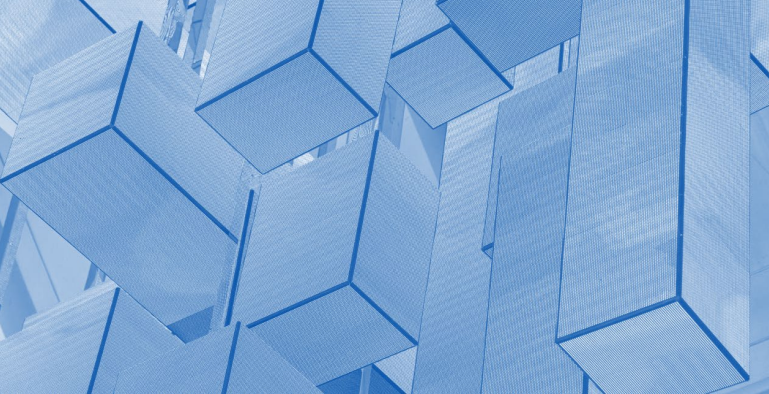
# Prerequisites for Salesforce Health Check or Salesforce Optimizer



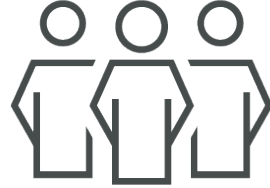
Permissions & Security Access



Familiarity With Salesforce Tools



Stakeholder Involvement



# What Is the Salesforce Health Check?

Salesforce Health Check is a tool that assesses the overall security health of your Salesforce org.

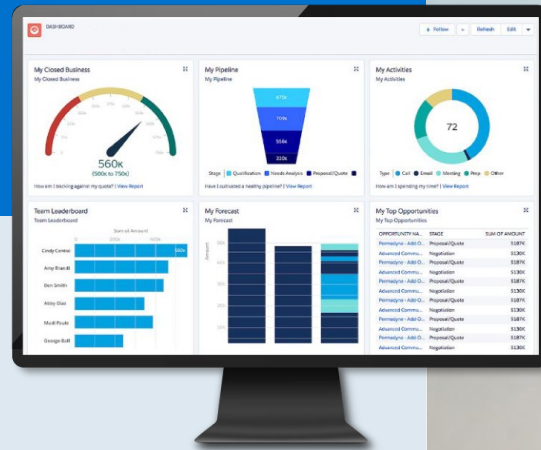
The screenshot displays the Salesforce Health Check interface. At the top, there is a search bar labeled 'Search Setup'. Below it, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains the text 'health', and a dropdown menu shows 'Security' with 'Health Check' selected. The main content area features a 'Health Check' header with a shield icon. Below the header, a message asks how well the org meets Salesforce security standards. A progress bar shows a score of 54% 'Very Poor' (with a '1' notification icon), indicating that 54% of the standard is met. A note suggests reaching out to the Salesforce Account team for more details. Below this, a section titled 'High-Risk Security Settings (13)' contains a table with the following data:

| STATUS   | SETTING   | GROUP                          | YOUR VALUE |
|----------|---|--------------------------------|------------|
| Critical | Expired Certificate                                       | Certificate and Key Management | 1          |
| Critical | Lock sessions to the domain in which they were first used | Session Settings               | Disabled   |

# Demo

salesforce

**PARTNER**



# What Is the Salesforce Optimizer?

Salesforce Optimizer is a tool that analyzes your Salesforce org to provide actionable insights & recommendations for improving performance, efficiency, & feature adoption.

The screenshot shows the Salesforce Optimizer interface. At the top, there is a search bar and navigation icons. Below that, the 'Salesforce Optimizer' header is visible with a sub-tab for 'Org Metrics'. The main content area is titled 'Results' and includes a 'Run Optimizer' button. Below the header, it indicates '55 items • Sorted by Status • Last run 07/08/2024, 10:45'. A table lists various optimization items with columns for Feature, Type, Estimated Effort, and Status.

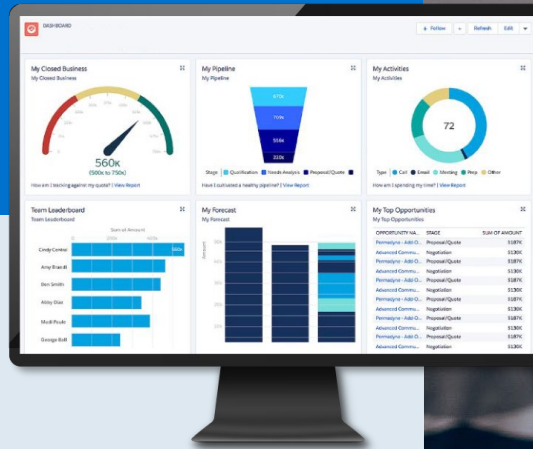
| Feature                                 | Type                    | Estimated Effort | Status                       |
|---|-------------------------|------------------|------------------------------|
| User Logins                             | User Management         | < 30 minutes     | Immediate Action Required ⚠️ |
| Insecure Default External Access Levels | Improve Org Security    | < 30 minutes     | Immediate Action Required ⚠️ |
| Pending Release Updates                 | Improve Org Security    | > 2 hours        | Action Required              |
| Field Usage                             | Fields                  | 30 - 60 minutes  | Review Required              |
| Incomplete Chatter Profiles             | Usage                   | < 30 minutes     | Review Required              |
| Profile Assignments                     | User Management         | 1 - 2 hours      | Review Required              |
| Hard-Coded URLs                         | Custom Code             | 30 - 60 minutes  | Review Required              |
| Unused Reports                          | Reports And Dashboards  | < 30 minutes     | Review Required              |
| Inactive Chatter Users                  | Usage                   | 30 - 60 minutes  | Review Required              |
| Unused Dashboards                       | Reports And Dashboards  | < 30 minutes     | Review Required              |
| Unassigned Custom Profiles              | User Management         | < 30 minutes     | Review Required              |
| Macros                                  | Improve User Experience | < 30 minutes     | Not Currently Enabled        |
| Case Feed                               | Improve User Experience | < 30 minutes     | Not Currently Enabled        |



# Demo

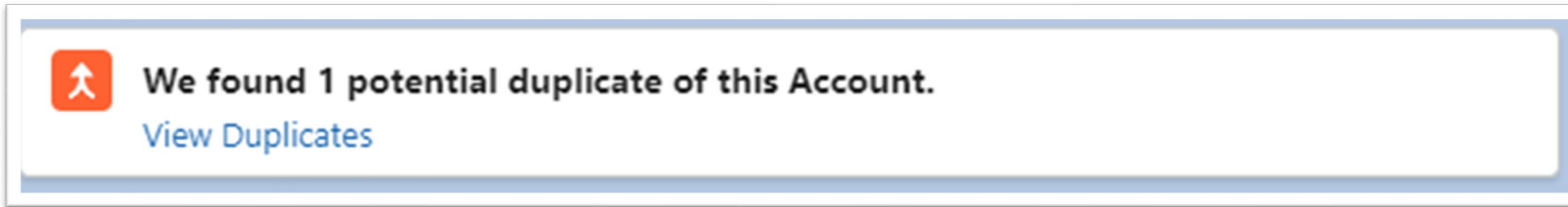
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# Salesforce Duplicate Rules & Matching Rules

1. **Matching Rules** specify the field & method for matching
2. **Duplicate Rules** utilize these matching rules to detect duplicates

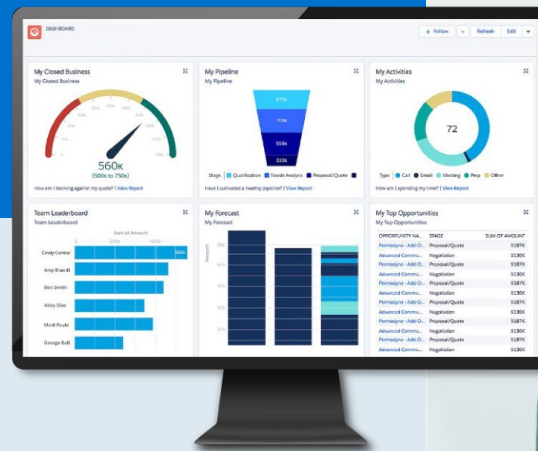


*Matching Rules = A recipe without a chef*

*Duplicate Rules = A chef using a recipe*



# Demo





# Key Areas to Review & Actionable Recommendations

- System Configuration & Customization Assessment

- Security Settings Evaluation

- Data Quality Management

- Performance & Scalability Analysis

- Automation & Workflow Review



# Q&A



Business  
Technology  
Services

## Questions?

# Contact

## Forvis Mazars



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