

# Salesforce PrecisionIQ Assessment

## Smarter Strategies for Salesforce ROI

Is your Salesforce investment driving real value—or just adding cost?

Disconnected data, manual workarounds, and unused features often lead to overspending and stalled growth. Many organizations aren't sure what they're paying for, how to scale, or how to clean up a cluttered instance that feels more like a junk drawer than a powerful customer relationship management (CRM) solution. And without clean, connected data, AI and personalization remain out of reach.

### Assessment Overview

Perficient's Salesforce PrecisionIQ Assessment helps you cut through the clutter. We review your people, processes, and platform to uncover gaps, reduce waste, and deliver actionable insights—so you can get more from what you already own.

### Engagement Offering

Through two packaged offerings, we evaluate your people, processes, and platform to uncover gaps, reduce technical waste, and deliver actionable insights so your Salesforce solution works harder for your business.

Our complimentary offering, conducted over three-to-five days, includes:

- An automated health check
- A walkthrough of findings
- Preliminary recommendations for cost-cutting and optimization

### PLATFORMS + TECHNOLOGY



Enhance these insights with additional paid services, delivered over two-to-five weeks, that include:

- An adoption plan to improve user engagement
- A comprehensive assessment of current Salesforce usage
- A roadmap to scale capabilities and unlock hidden value
- Guidance to prepare your data for AI and personalization
- A strategy to reduce technical debt and future-proof your platform

We will help you realize greater efficiency, smarter spending, and a Salesforce platform that works harder for your business.

If you're ready to turn potential into performance, it starts with Perficient's Salesforce PrecisionIQ Assessment.

## Why Perficient

We're an Enterprise Salesforce Partner specializing in CRM, data, AI, and personalization. For more than 15 years, we have built industry-specific Salesforce solutions that help Fortune 1000 organizations enable data-driven decisions and deliver personalization at scale.

- 8x Navigator Experts
- 595+ projects
- 1600+ certifications
- 4.8/5.0 CSAT score



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