



Prudence B2B

Transforming Industries, Empowering Communities



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SALESFORCE HEALTH CHECK

Understand what is working, what is creating risk, and what should be improved first.

Starting at \$2,000 | 7-10 business days | Remote delivery

Prudence B2B provides an independent review of your Salesforce environment and converts the findings into a practical, prioritized roadmap. The engagement is designed for organizations that need experienced guidance without committing to a large implementation.

When this service is most useful

Unclear priorities Many requests exist, but the organization is unsure what to address first.	Operational friction Users rely on spreadsheets, manual steps, or unreliable reports.	Administrator gap Internal Salesforce capacity is limited or a prior administrator has left.
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Assessment areas

- Business alignment and user needs
- Configuration, data model, and maintainability
- Security, roles, profiles, permission sets, and sharing
- Flows, automation, approvals, and notifications
- Data quality, duplicates, completeness, and consistency
- Reports, dashboards, integrations, documentation, and adoption

What you receive

- Executive summary and current-state observations
- Risk and issue register
- Quick-win recommendations
- Prioritized improvement roadmap
- High-level implementation estimate
- 60-minute findings presentation

Engagement parameters

Fixed fee	\$2,000
Stakeholder interviews	Up to three
Payment terms	50% at initiation; 50% upon delivery
Client participation	Access to a Salesforce sandbox or production environment, relevant documentation, and key stakeholders
Next step	Optional fixed-scope Improvement Sprint or monthly support proposal



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