hubbl™ DIAGNOSTICS

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How to grow your consultancy with Salesforce org assessments

Are you looking to grow your Salesforce consulting practice? Do you want to engage your existing customers and provide more value?

It's no secret that more and more organizations are pivoting towards recurring revenue models. Offerings such as managed services and subscriptions not only provide a better customer experience, they also drive cross-selling opportunities, promote brand loyalty, and stimulate new revenue streams.

But communicating this value to customers is often easier said than done. It can be difficult to convince key business decision makers that an investment in their Salesforce org health is also an investment in their overall business health.

So how can a humble org assessment propel your business growth? Read on to find out.

The multi-billion dollar opportunity

Salesforce is aging. Now over 20 years old, technical debt exists in most orgs in the ecosystem. And with the continuation of product retirements, such as the upcoming depreciation of Workflow and Process Builder, we don't see this lessening anytime soon.

We recently forecast there are >20 million hours of consulting services in the Salesforce ecosystem for migration Workflow and Process to Flow alone, translating to a multi-billion dollar opportunity for consultants.

> "Consulting partners who have the tools, data, and skills to effectively communicate this need to their clients, are building robust recurring revenue practices around technical debt remediation."

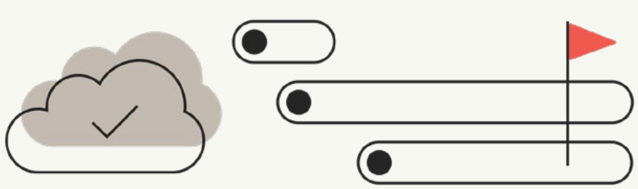
What is a Salesforce org assessment?

A Salesforce org assessment provides a detailed view of your org's health, complexity, security, permissions, and more. Org assessments come in all shapes and sizes depending on who's conducting your assessment, the tools they utilize and who the output is geared toward.

Depending on the type and depth of the Salesforce org assessment it could include analysis of:

- Platform
- Architecture
- System overview
- Data
- Code
- Business processes

Outputs range from reports/dashboards to full working sessions walking through the results and a statement of work to address any findings.



Who needs Salesforce org assessments?

- Existing customers in need of health check.
- Organizations expanding to new business functions.

- Multi-org customers looking to consolidate. (e.g., mergers and acquisitions, survivorship).
- Customers with migration projects.
- Executives, consultants, Salesforce admins, project managers, or anyone adopting an existing Salesforce org.
- Organizations looking to streamline complex integration infrastructure.

Salesforce org assessment strategies

Choosing your assessment strategy from a pricing and delivery perspective is a critical first step toward structuring your business for customer success. Consultants generally rely on two approaches to pricing org assessments:

- **Free offering:** A low-level effort solution with a high-impact deliverable on the state of the org with basic recommendations. Can be powered by any combination of onshore/offshore resources and automated org intelligence.
- **Paid offering:** In-depth forensic audit of the system. Provides recommendations for technical changes, process optimization, and technical debt mitigation strategies.

Consultancies also leverage several different delivery strategies to best utilize their talent:

- **Cloud focused:** Specialize in remediating specific processes in certain clouds.
- **Declarative automation focused:** Small consultancies working a small bench. Tackle any minor declarative remediation work such as workflow, Flow, or Process Builder.
- **Custom dev focused:** Advanced developers available to navigate the deepest complexities of a Salesforce org. (e.g., Apex triggers, classes, visualforce, lightning web components).
- **Business transformational approach:** Focused on digital transformation, technical remediation and optimization, DevOps go-live, and change management.

The various combinations of these pricing and delivery strategies allow consultancies to build their own niche when it comes to org assessments.

Steps to building Salesforce org assessment offering

1. DEFINE A PRICING STRATEGY

Some examples of pricing strategies include:

- **Fixed-price** assessment with a rigid set deliverables.
- **"Technology Fee"** added directly into the Statement of Work (SOW) for a larger project. This can be a fixed fee or a percentage of the contract amount that covers the cost of tools used by the consultant to execute the work.
- **Monthly "bucket of hours"** where customers sign up for a fixed number of hours in a recurring fee.
- **Free offering** where consultants provide a rigid set of deliverables to help gain net-new logos.

2. Name your offering

Salesforce technical remediation projects are sold under many monikers such as:

- Org Assessment
- Org Health Assessment
- Org Audit
- Health Check
- Tech Debt Remediation
- Ride the wave or make it your own.

3. Staff your team

Depending on the depth of your offering, you'll need everything from business analysts, declarative automation experts, architect-level developers, to change management consultants. Think about specializing your go-to market with targeted account executives and marketing resources.

Often, the most successful niche assessments include subject matter experts with deep experience. (e.g., a Financial Service expert).

4. Identify accounts and prospects

Delivery leaders, in concert with business development/sales and customer success, help identify accounts that:

- Are active accounts with active projects.
- Have orgs with high levels of complexity or obvious technical debt.
- Have trusting relationships with key individuals.

5. Activate marketing and alliances

- Craft key messages that promote the outcomes of org assessments.
- Develop target account list for omni-channel marketing campaign.
- Engage Salesforce partner channel to engage with legacy customers.
- Plan campaigns to engage and acquire net-new logos.

Automating org assessments

Many org assessments are done by requesting access to the client's Salesforce org and 'clicking through setup' to see what is going on or by doing "reverse-demos" where the client walks through the org as the consultant guides them.

From our survey of dozens of consultancies, this is at minimum 40-80 hours of work to get a decent assessment of the org. Manual clicking is passable in only the most nascent of orgs. Since it's human decision dependent, the assessment is not scalable, quantitative, or objective.

There is a better way.

With Hubbl Diagnostics, it takes less than a minute to initiate a scan of a Salesforce org and you are back to work on more important things. Once initiated, the scanning process for even the most complex orgs is completed in less than 10 minutes.

> "Freeing up the time of your most valued solution engineers and architects is paramount to a growing Salesforce consultancy."

Collating the data is one thing, but generating executive-level visualization that can explain the metadata is time consuming. The best approach is to automate the visualizations, so your architects can focus on interpreting the data versus making charts. Hubbl Diagnostics provides out-of-the-box executive level visualizations that allow you drive revenue-generating conversations with quantitative and objective data.

Automated org assessments can improve your margins, improve decision-making, and protect your business. Besides, customers are demanding automated assessments rather than paying an hourly rate to dig through their org.

What's the ROI on org assessments?

Org assessments are a very powerful tool for both net-new logo acquisition and ongoing managed services work.

Utilizing Salesforce org assessments helps you:

- Identify new opportunities.
- Build trust through transparency by show customers inside their org.
- Drive efficient cycles by reducing manual work and identify issues faster.

Build your Salesforce org assessment practice with Hubbl Diagnostics.

Empower your team to identify scope, create accurate estimates, decrease manual tasks, and gain a holistic view of a client's org to deliver more value to your customers.

SEE HOW IT WORKS