



Check-Up Time:

How to Maximize Your
Salesforce Investment



Meet Accelerize360

Accelerize360 is a dedicated team of Salesforce experts and the last technology partner you'll need. Our goal is to get this software suite adapted to your unique business, whether you're a hotel, resort, airline or cruise line. We'll empower your team with unprecedented guest insights.

What is a health check?

Our team will review your current tech stack, advising you how to eliminate tech "debt" and maximize the tools your team actually needs. If your Salesforce implementation happened ages ago or you used to have a Salesforce admin but now don't, it's time for a health check.

[Book a FREE Discovery Session](#)

Here's what we'll accomplish together:

- Increase your agent productivity by automating repetitive tasks
- Create consistent yet personalized CX by streamlining sales and service workflows
- Increase conversion by tailoring customer communications
- Expand user adoption by adapting Salesforce to your specific business operations
- Create a 360-degree customer view by bringing multiple data sources into Salesforce

Our review process is common-sense and transparent. See for yourself:

Salesforce CRM

The data model

- What objects are being used?
- What relationships do these objects have?
- What validation rules do you have? Are these rules effective?

The security model

- What roles and profiles are being used?
- Are permission sets appropriately allocated?
- What sharing rules, restriction rules and OWDs do you have?
- Do all objects have the appropriate permissions?

Automations

- Are you using Workflows or Process Builders?
- Are you using Flows for large data volume scenarios? How optimized are the Flows?
- What Apex Triggers and Apex Jobs do you have? Are they written following coding best practices?

Integrations

- What AppExchange apps are installed? Are they functioning as expected?
- What custom integrations have been built? Do they have proper error handling and secure authentication?
- Are the integrations compatible with the automations?

The UI

- What are the List Views, Page Layouts and Page Builders for each object? Can they be more user-friendly?
- What VF pages, Lightning Components and LWCs are being used?

Reports

- What reports are being used? Is your team satisfied?
- What dashboards are being used? Is your team satisfied?



Adoption

- How well are the current business functions served by Salesforce?
- Are there additional business requirements that Salesforce can ease?

Overall system health

- Are you using Lightning or Classic?
- What is your data storage use?
- What is the API limit use?
- Are your licenses right-sized?

Marketing Cloud

The basics

- What is your Email Deliverability status?
- Is the Business Unit hierarchy correct?
- Have the SAP and SSL been configured correctly?

Assets

- Are your emails and landing pages responsive? Does your team have templates for emails and web pages?
- Are you taking advantage of email personalization?

The data model

- Have the Data Extensions been built correctly?
- Are you using Lists instead of Data Extensions?
- Have you taken advantage of Contact Builder to build the optimal relationships?
- Are you using the correct Contact Key?

Automations

- Are the queries and scripts in Automation Studio written correctly and following best practices?
- Have Einstein Recommendations been implemented?
- Are the customer journeys optimized?

Integrations

- Is the data coming in correctly?
- Is the right integration mechanism being used for each integration (SFTP, DE APIs, Journey APIs, Installed packages, SSJS, AMPScript, MC Connect)?

Reports

- What edition of Reports do you have? Are you taking full advantage of all the features?

Check-Ups Are Important

Just as with personal health, regular check-ups are a best practice. If you neglect your tech stack, its usefulness will deteriorate over time. This list may seem daunting, but you don't have to go it alone. Our team has the expertise to help you delight the digital-first traveler.

To book your discovery call, contact Rob Egan:

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