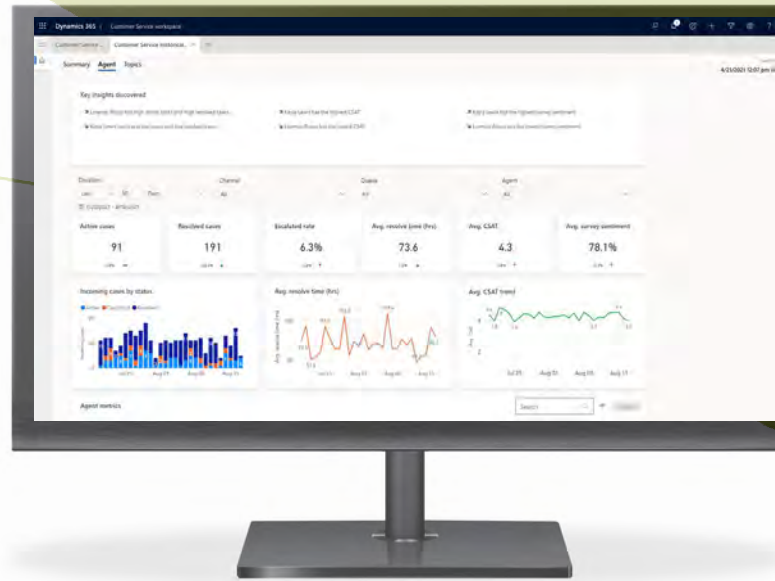# armanino

CRM Health Check

CRM

Take Advantage of Armanino's Complimentary Health Check

Armanino helps clients bridge the data gap between their CRM and other business systems. More than simply keeping your accounts and addresses synchronized, configuration and integrations eliminate the need to maintain common data in multiple systems separately.

ASSESSMENT

Upon Completion of the Health Check, Clients Will Receive:

- Percent of custom code versus configuration
- User adoption gaps
- Data storage
- API limits
- Effective use of process builders and workflows
- A high level assessment of the components in use by the client

BENEFITS

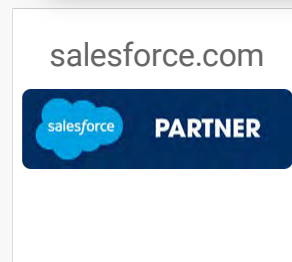| Inventory of Configuration | Compilation of Custom Fields | Database Storage Review | Workflow Analysis & Review | High-level Assessment of Client Leveraged Elements |

Scoping Requirements

✓ Access to all modules/components/clouds within the client's CRM footprint. Ecosystem tools such as middleware integration, task automation outside of CRM, BI reporting and ISVs, are not in scope for the complimentary Health Check.

✓ Armanino will spend 2-3 hours with the client's CRM user group. This generally includes the client's resources involved in the strategic and day-to-day use of the platform including the CRM Admin, Sales Operations, the Product Owner and/or users on the business side in marketing, sales and service.

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