

Salesforce Org. Health Check



Fix Your Salesforce: Unlock Speed, ROI, and AI Readiness

Many Salesforce environments appear functional on the surface but are quietly constrained by underlying issues that limit performance, increase costs, and stall innovation. Over time, layers of conflicting automation, inconsistent and incomplete data, and misaligned business processes create operational friction across teams. Users rely on manual workarounds, reporting becomes unreliable, and integrations fail silently, making it difficult for leadership to trust the system or make informed decisions.

As complexity grows, so does technical debt. Legacy workflows, redundant tools, and permission sprawl make the environment harder to manage, slower to adapt, and increasingly expensive to maintain. Organizations often find themselves paying for unused licenses and features while struggling with low adoption and inefficient processes. At the same time, AI initiatives fail to gain traction because the underlying data and system design are not ready to support them—leaving significant value on the table.

OSI Digital delivers a rapid, expert-led Salesforce assessment designed to uncover these hidden inefficiencies and provide a clear, actionable path forward. We take a comprehensive view of your environment—analyzing data quality, process alignment, automation logic, system architecture, integrations, and user experience—to identify what's slowing your organization down and where the greatest opportunities exist. Our approach goes beyond surface-level fixes. We pinpoint root causes, quantify their impact, and prioritize improvements that drive immediate and measurable results. The outcome is a structured roadmap that outlines quick wins alongside longer-term strategic initiatives, enabling you to optimize performance, reduce costs, and modernize your Salesforce environment with confidence.

The Results:

- › Improved system performance and faster operations
- › Reduced costs from license waste and inefficiencies
- › Increased user adoption through better experience and usability
- › Clean, reliable data for accurate reporting and AI
- › Elimination of technical debt and automation conflicts
- › A clear, prioritized roadmap for modernization and growth



What We Assess

We also evaluate permission models to uncover complexity and risk, assess technical debt including legacy automation and unused components, and review integration architecture to identify performance or reliability gaps. In addition, we examine user experience and usability to understand adoption challenges, identify automation conflicts across tools, and ensure reporting aligns with key business metrics.

Key Outcomes

At the conclusion of the assessment, organizations gain a clear understanding of what is limiting performance and how to fix it. You receive a prioritized roadmap that outlines immediate quick wins alongside longer-term strategic improvements. Systems become more efficient and easier to use, while data becomes more reliable and actionable. Costs are reduced through the elimination of waste and redundancy, and teams are better equipped to adopt and scale new capabilities, including AI.

Unlock the Full Value of Your Salesforce Investment

Salesforce should be a driver of growth—not a source of friction. Without addressing underlying issues, organizations risk continued inefficiencies, rising costs, and missed opportunities for innovation. A structured, expert-led approach is essential to unlocking the full value of your Salesforce investment. OSI Digital combines deep Salesforce expertise with a business-first approach to transformation. We focus on delivering practical, actionable insights that drive measurable results quickly, while building a strong foundation for long-term scalability. From assessment through execution, we help organizations modernize their Salesforce environment, improve adoption, and confidently prepare for AI-driven growth.



Let's Get Started

Contact our sales team at 818.992.2700 to learn more about our solutions





OSI Digital



About OSI Digital

OSI Digital, Inc., provides purpose-built business and technology solutions that optimize performance to enable data-driven outcomes for our customers. OSI accelerates digital transformation by offering integrated solutions that capture, secure, integrate, analyze, and optimize data. Our services include the design, development, and implementation of new solutions as well as the ongoing management, enhancement, and support of our customers' existing business systems.

OSI Digital was founded in 1993, in California and has since expanded to a global team of employees worldwide. We have offices in the US, Canada, India, Philippines, Dubai, Australia, Malaysia, UK and Ireland. Our main offshore delivery center of excellence is located at our state-of-the-art campus in Hyderabad, India, with additional locations in Chennai, Delhi, and Bangalore. For over 30 years and counting, we have supported a diverse portfolio of customers across various industries, including: Software & Business Services, Financial Services, Life Sciences & Healthcare, Manufacturing, Energy, Retail, Agriculture, and the Public Sector.

Our client base ranges from start-ups to Fortune 500 corporations, including: Hyundai AutoEver America, Hyundai Capital America, Moderna, Virgin Galactic, Uni Uni, Jones Logistics, Stanley, Skechers, US News & World Report, and World Oil.

OSI Digital has developed strong partner alliances with the world's leading technology providers such as Oracle NetSuite, Boomi, Salesforce, Tableau, Power BI, Databricks, Microsoft, Amazon Web Services, Snowflake, Workato and Celigo.

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