

G-Cloud 15 Service Description

Salesforce CRM/CMS Healthcheck

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Methods' Salesforce CRM/CMS Healthcheck service is tailored to help you evaluate performance, security considerations, scalability, and maintainability of your existing implementation across various Salesforce clouds, including Service, Sales & Experience Clouds; Integration; CPQ; and more.

Our aim is to help you harness the full potential of the Salesforce CRM/CMS platform.

What is the Service

Receive a complete view of your Salesforce CRM/CMS implementation with Methods’ Healthcheck.

Led by experienced architects, it offers detailed reports and clear recommendations for maximising business benefits and enhancing security.

Assess customisations versus configurations, with a roadmap for streamlined operations.

Regardless of the size of the implementation, a comprehensive analysis will be conducted, adhering to best practices for Salesforce implementation. For organisations with large data volumes, particular attention will be given to Salesforce limits during the analysis.

What can it do for you

Methods' Salesforce CRM/CMS Healthcheck will provide you with a 360-degree view of your current Salesforce CRM/CMS implementation and business processes.

This will be carried out by an experienced Salesforce architect with public sector knowledge, and previous experience of Salesforce CRM/CMS healthchecks.

A full and detailed Salesforce CRM/CMS health check report will be produced providing you with clear recommendations on how to maximise your business benefits by leveraging the Salesforce platform, as well as identifying security improvements.

Includes a review of customisation versus configuration and a roadmap to achieve lower levels of customisation.

Service Features

- 1. Gain insights into your Salesforce organisation's status and health
- 2. Pinpoint and address your Salesforce pain points
- 3. Healthcheck by highly skilled and certified Salesforce architects
- 4. Full healthcheck report with recommendations for improvements
- 5. Create a strategic roadmap for enhancing performance and achieving improvements
- 6. Maximise the value/ROI of your CRM/CMS implementation
- 7. Stay ahead by leveraging the latest Salesforce features
- 8. Business process improvement recommendations
- 9. Assess customisations versus configurations, with a roadmap for streamlined development
- 10. Security review and priority actions

Service Benefits

- 1. Understand the status/health of your current Salesforce organisation
- 2. Healthcheck by highly skilled and certified Salesforce architects
- 3. Full healthcheck report with recommendations for improvements
- 4. Develop a roadmap for effective improvement strategies
- 5. Maximise the value/ROI of your CRM/CMS implementation
- 6. Ensure you are taking advantage of latest Salesforce features
- 7. Tailored recommendations for enhancing business processes
- 8. Assess customisations versus configurations, with a roadmap for streamlined development
- 9. Thorough security review and prioritisation of necessary steps and actions

Contact details

End-to-end transformation and innovation experts

Applying our skills in innovation and collaboration from across the Methods Group, to deliver end-to-end business and technical solutions that are people-centred, safe, and designed for the future.

Methods provide collaborative and innovative solutions to help Central Government adapt to the changing landscape and deliver better outcomes for citizens.

With a focus on driving interoperability and innovation in UK Central Government, we have helped multiple organisations in the sector modernise their IT architecture, systems, strategy, and operating models to improve organisational resilience and service delivery.

Methods deliver wide-ranging services and thought leadership to support delivery including:



Onboarding and offboarding process



Ordering and Invoicing

Once we have agreed a Statement of Work(s) we will sign the appropriate agreement and complete a Call Off contract with an attached Statement of Work(s), and submission of a Purchase Order. We will then set up a mutually acceptable start date and commence work.

Payment terms are 30 days or less as may be agreed.

Please note - we are unable to accept Government Procurement Card (GPC) payments.



Customer Responsibilities

For any given requirement, we will identify any dependencies on the customer (e.g. access to key stakeholders, facilities, documentation, etc.) and agree these at the start of the work.

Making a difference

The work we do each day is focused on delivering a positive difference for the public sector for the benefit of society as a whole.



Customer stories



Cloud Hosting & Service Modernisation
Modernised digital services using secure cloud hosting, streamlined legacy workflows, and improved data insights. Delivered faster decisions, reduced manual effort, and a more transparent, **user-friendly experience** for internal teams and external users.



Cloud-Based ITSM Consolidation
Unified multiple service desks onto a cloud-based ITSM platform, standardising processes and automating workflows. Improved incident, change, and problem management, **boosting overall service reliability, efficiency, and organisational visibility.**



Large-Scale Cloud Migration (100+ Apps / 120TB)
Delivered cloud migration of **100+ legacy applications** and **120TB of data** with **100% availability.** Strengthened compliance, improved transparency, and significantly enhanced operational resilience across critical digital services.



Azure Migration & Modern Workplace Enablement
Migrated data centres to Azure and deployed modern workplace cloud services, delivering secure, scalable infrastructure. Achieved improved user experience, strengthened security posture, and **£1m savings** - all with zero service disruption.



Cloud ITSM Migration (ServiceNow SaaS)
Successfully migrated from a legacy ITSM tool to a modern, cloud-based ServiceNow platform. Delivered scalable, robust service operations, strengthened governance, and enabled faster, more consistent digital service delivery across the organisation.



Cloud-Native Data Pipelines (Azure Integration)
Built automated Azure Data Factory pipelines into a Lakehouse architecture, using Bronze/Silver/Gold layers and Delta with CI/CD. Delivered secure daily refreshes, improved data quality, lower manual effort, and more efficient reporting.