

ARE YOU GETTING THE MOST OUT OF YOUR SALESFORCE INVESTMENT?

Many manufacturing leaders invest heavily in Salesforce but struggle to see the return they expected. Often, hidden blockers in your data, workflows, or platform setup are quietly leaking value and limiting growth.

This worksheet is designed to help you uncover what's holding your Salesforce instance back. By answering 15 quick questions, you'll get a clear picture of where Salesforce is working—and where it's working against you.

At TruSummit Solutions, we specialize in helping manufacturers like you fix these issues and unlock the full potential of Salesforce. **Ready to find out if your Salesforce setup is built for scale or stuck in a mess?** Let's get started.

QUICK SELF-ASSESSMENT

For each statement, choose Yes, Somewhat, or No. At the end, we'll give you a score—and more importantly, next steps to take to get your Salesforce operation back on track.

RISK AREA	SELF-CHECK	YOUR RESPONSE
Data Quality & Accessibility	Our Salesforce data is consistently accurate and up to date.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	Our team can easily access the data they need to make informed decisions.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	Duplicate or incomplete records rarely cause issues.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	Data flows between Salesforce and ERP systems are reliable, automated, and do not require manual intervention.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
Workflow Alignment & Automation	Our Salesforce workflows closely match our real-world manufacturing processes.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	Manual workarounds are rare for critical tasks.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	We use automation to reduce repetitive work and minimize errors.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
User Adoption & Training	Sales, service, and operations teams actively use Salesforce daily.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	Users understand how to leverage Salesforce features relevant to their roles.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	Ongoing training and support are provided when new features or processes are introduced.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No

QUICK SELF-ASSESSMENT

Continued...

RISK AREA	SELF-CHECK	YOUR RESPONSE
Release Management & DevOps Maturity	We follow a structured release process that includes planning, testing, and user feedback.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	Release priorities are driven by business needs and direct input from end users.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	We use DevOps practices (e.g., version control, automated testing, CI/CD) to ensure stable and scalable deployments.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
Forecasting & Reporting	We can reliably forecast sales and production using Salesforce data.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	Dashboards and reports are tailored to our manufacturing KPIs.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	Leadership trusts the numbers and insights Salesforce provides.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
AI & Future Readiness	Our Salesforce instance is prepared to support AI-driven insights and automation.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	We capture the right data to unlock future analytics and AI capabilities.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
	We have a clear, ongoing roadmap for evolving our Salesforce investment to meet the changing needs of our business.	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No
		Total _____

SCORING

Yes = 0 points | Somewhat = 1 point | No = 2 points

Your Total Score: _____



0-9 Points: On Track

Your Salesforce foundation is in good shape. Keep building.

Suggested Action: Even the most sophisticated organizations have an opportunity to improve their Salesforce instance and make it work harder for the organization. Check out this webinar where we walk through determining the value of Salesforce AI and how to secure executive buy-in for your AI initiatives.



10-21 Points: Warning Signs

Efficiency, accuracy, or adoption gaps are holding your team back.

Suggested Action: Use this moment to get your Salesforce instance closer to where it should be. Our 3-step checklist outlines practical, high-impact ways to clean up workflows, tighten alignment, and mitigate risks.

[Click here to access the checklist now.](#)



22-38 Points: URGENT

Your Salesforce setup is likely costing you time, clarity, and margin. Time to dig deeper.

Suggested Action: Schedule a free 30-minute consultation with TruSummit to identify root issues and fast-track solutions.

[Schedule Now](#)

NEXT STEPS

We won't pretend this quiz solves everything. But it should show you what you can address today and **what might need expert support.**

Need More Help?

Book a free 30-minute Salesforce Reality Check. We'll review your responses together and outline a roadmap that fits your goals, team, and timeline.



SALESFORCE SOLUTIONS

Designed for Manufacturing Complexity

TruSummit doesn't just "do implementation." We act as strategic partners, guiding manufacturers across every stage of the Salesforce journey, from vision to value realization.



Direct Access to Senior Experts

No handoffs. No junior teams learning on your dime.

Every engagement is led by senior consultants who know manufacturing and know how to make Salesforce stick.



Collaborative, Co-Created Solutions

We co-create every solution with your team, so it's not just technically sound, but fully aligned and adopted.

We ask the right questions, map your actual workflows, and build trust at every step.



Flexible Engagement Models

Wherever you are on your Salesforce journey, we meet you there.

From focused projects to managed services, or a hybrid of both, our flexible approach supports real business outcomes.

NOT SURE WHERE TO START?

Let's walk through where you are and where you want to go.

Talk to a Senior Consultant.

