



**8 WEST IMPACT ENGAGEMENTS**

# **Salesforce Architecture & Optimization Review**

10+1 Days | 6–15 Participants | Virtual or On-Site  
Fixed-Fee Engagement [\$30,000]



# Workshop Overview

**8 West Consulting's Salesforce Architecture & Optimization Review is a fixed-scope, high-impact engagement designed to evaluate the design, scalability, and performance of your Salesforce environment, or your readiness to implement or migrate to Salesforce.**

Grounded in the AWS and Salesforce Well-Architected Frameworks, this workshop combines the disciplines of both ecosystems to assess your architecture through the lenses of Trusted, Easy, and Adaptable solutions while maintaining alignment with AWS's six pillars: **Operational Excellence, Security, Reliability, Performance Efficiency, Cost Optimization, and Sustainability.**

Our certified Salesforce consultants bring deep experience across Sales Cloud, Service Cloud, Marketing Cloud, and Health Cloud, coupled with 8 West's enterprise-software engineering heritage. We focus on real-world challenges: performance degradation, inefficient automations, brittle integrations, data-ingestion complexity, and cross-org misalignment.

The outcome is a comprehensive blueprint for architectural health and modernization, showing how Salesforce can operate efficiently, scale confidently, and integrate seamlessly with the broader enterprise.



## SALESFORCE SERVICE LIST

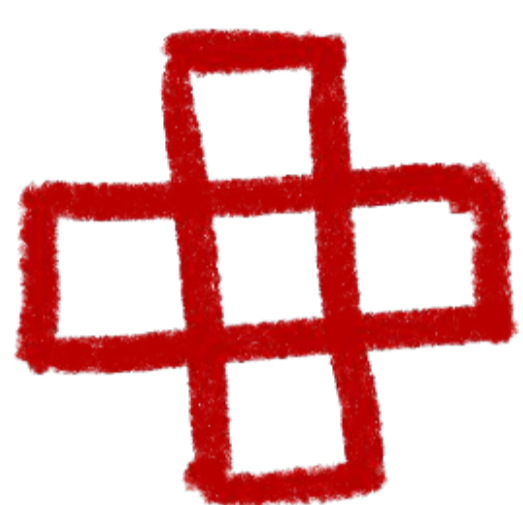
- Health Cloud
- Sales Cloud
- Service Cloud
- Salesforce Architecture Review
- Automation Optimisation [Flows and Apex]
- Integration and Data Flow Analysis
- Multi-Org Strategy and Governance
- Security and Compliance Review
- Performance and Scalability Assessment

# Workshop Outcomes



## COMPREHENSIVE PLATFORM ASSESSMENT

Full evaluation of org design, data model, automations, security, and integration health across all Salesforce Clouds.



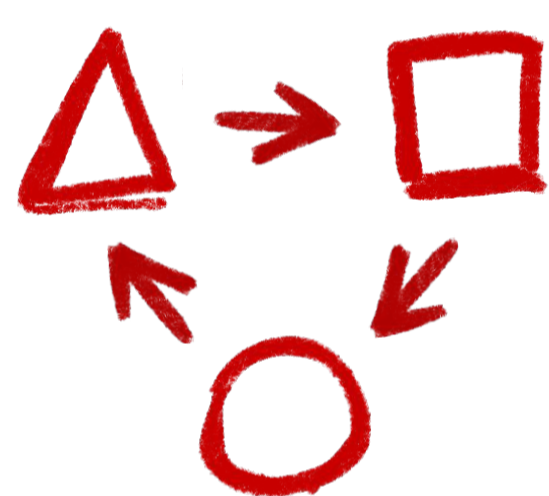
## SALESFORCE WELL-ARCHITECTED ALIGNMENT

Recommendations structured around Trusted (security, compliance, reliability), Easy (maintainability, efficiency, automation), and Adaptable (resilience, interoperability, composability) design principles.



## INTEGRATION & DATA MATURITY REVIEW

Assessments of data ingestion (OmniScript forms, APIs, Data Loader, file import, middleware) and cross-system data sharing.



## MULTI-ORG STRATEGY REVIEW

Analysis of multi-org vs single-org architectures, governance, and data-sharing models to maximize scalability and maintainability.



## AUTOMATION OPTIMIZATION PLAN

Rationalization of automation layers (Flow, Apex, Agentforce, Copilot) to remove duplication, improve performance, and enhance user experience.



## PRIORITIZED REMEDIATION ROADMAP

Actionable roadmap categorizing improvements into quick wins, medium-term initiatives, and strategic redesigns.



## EXECUTIVE READ-OUT

Business-focused summary mapping technical findings to outcomes such as onboarding time, sales cycle efficiency, and marketing ROI.

# Who Should Attend

ROLE	WHY THEY'RE CRITICAL
CIO / CTO / CRM Sponsor	Ensure alignment of platform vision with enterprise strategy.
Salesforce Product Owner	Provide roadmap context, org governance, and release strategy.
Business Leads (Sales, Marketing, Service, Provider Ops)	Represent process requirements and user-experience challenges.
Data & Integration Architect	Explain middleware, APIs, ETL, and system connectivity.
Salesforce Admin / DevOps Lead	Discuss automation, Flows, deployment, and monitoring.
Provider Ops / Credentialling Manager	Validate fit for provider workflows and onboarding.
Compliance & Security Officer	Review data protection, access control, and audit policies.

# Activities & Agenda

## PRE-ENGAGEMENT ALIGNMENT

Brief executive and key stakeholder kick-off to align on outcomes, success criteria, expectations, and communication plan before Day 1.

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## DAY 1 KICK-OFF & ALIGNMENT

### FOCUS

Objectives & success definition

### KEY ACTIVITIES

Establish goals, review current pain-points, identify key workloads, confirm success metrics.

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## DAY 2 - 3 ARCHITECTURE & DATA REVIEW

### FOCUS

Org structure, data model, security & integrations

### KEY ACTIVITIES

Assess schema design, automation layers, and data-ingestion mechanisms (OmniScripts, APIs, Data Loader, file inputs); review API and middleware performance.

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## DAY 4 - 5 PROCESS & AUTOMATION DEEP-DIVES

### FOCUS

Goals, scope & success definition

### KEY ACTIVITIES

Map end-to-end processes; evaluate automation efficiency (Flow, Apex, Agentforce, Copilot); identify anti-patterns impacting reliability.

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## Activities & Agenda Continued...

### DAY 6 - 7 MULTI-ORG STRATEGY & INTEGRATION PATTERNS

**FOCUS**

Cross-org & cross-system architecture

**KEY ACTIVITIES**

Evaluate single-org vs multi-org configurations, data-sharing models, and integration topology (middleware, event streaming, batch pipelines).

### DAY 8 - 9 ANALYSIS & ROADMAP DEVELOPMENT

**FOCUS**

Offline consultant work

**KEY ACTIVITIES**

Score maturity across AWS & Salesforce frameworks, document findings, develop prioritised roadmap and visual scorecards.

### DAY 10 INTERIM READ-OUT

**FOCUS**

Present interim findings & align priorities

**KEY ACTIVITIES**

Deliver interim report, maturity heatmaps, and roadmap; confirm ownership and next steps.

**(2 WEEKS LATER)**

### FINAL REPORT DELIVERY AND EXECUTIVE READOUT

**FOCUS**

Report Delivery & Plan next steps to maintain momentum

**KEY ACTIVITIES**

Report Delivery, Review progress, address questions, and assist planning of remediation projects.

# Engagement Model & Pricing



## **FIXED FEE ENGAGEMENT**

Starting at \$30,000 for review of one primary Salesforce org; pricing adjusted for multi-org analysis.



## **VALUE-FOCUSED**

Typical clients achieve measurable improvements in automation efficiency, data integrity, and integration performance within one quarter.



## **NO SURPRISES**

Clear scope and deliverables from the outset.



## **FLEXIBLE SCALING**

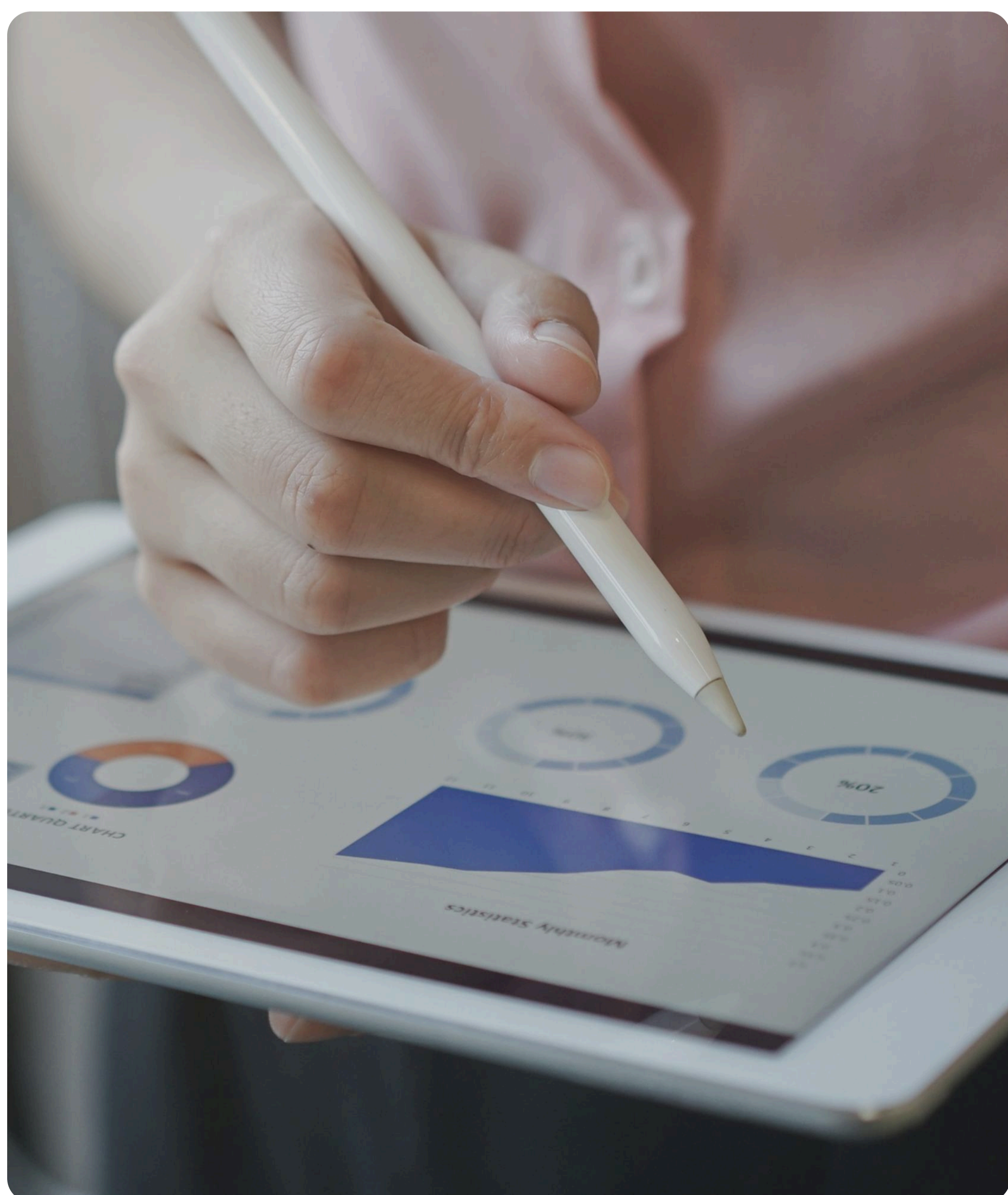
Options for deeper technical remediation or cloud-specific enhancement projects following the initial review.

## Delivery Format

- + Virtual-First** Delivered via secure video sessions and shared architecture tools.
- + On-Site Option** Ideal for complex workshops or executive presentations.
- + Flexible Scheduling** Ten-day agenda can run consecutively or spread across multiple weeks.
- + Digital Deliverables** Comprehensive report, maturity scorecards, roadmap slides, and executive summary.



## Client Success Metrics



- + Reduction in manual workflows and automation conflicts.**
- + Faster data ingestion and integration reliability.**
- + Improved scalability and performance under load.**
- + Clear governance model for multi-org operations.**
- + Increased adoption and stakeholder confidence..**

## Technical Focus Areas

### + Architecture & Performance

Org design, record volume management, Apex governor limits, Lightning performance.

### + Integration & Data Flow

Review of inbound/outbound data through OmniScripts, files, Data Loader, APIs, and middleware pipelines.

### + Automation Optimization

Flow vs Apex balance, automation governance, Agentforce enablement, CI/CD pipeline health.

### + Security & Compliance

Role hierarchies, sharing rules, data encryption, audit trails.

### + Multi-Org Design & Interoperability

Integration and governance between multiple orgs, data consistency and visibility.

### + Trusted, Easy, Adaptable

**Alignment** Ensure architecture is secure and compliant **(Trusted)**, efficient and maintainable **(Easy)**, and resilient and interoperable **(Adaptable)**.



## Why 8 West

8 West combines Salesforce-certified expertise, enterprise-scale software delivery capability, and deep domain understanding in healthcare, dental, and insurance. Our consultants bridge architecture and engineering, translating business goals into reliable, scalable, and compliant solutions.

We offer skilled, industry-aware teams from Ireland, providing exceptional value compared with U.S. market rates, without compromising on quality, experience, or delivery speed.

This Impact Engagement provides a clear, actionable path to strengthen your Salesforce architecture, improve performance, and unlock automation opportunities.



“ 8 West’s certified Salesforce experts rapidly understood both our platform and our business.

Their depth in Health Cloud, Sales Cloud, and Service Cloud, combined with their domain knowledge, enabled us to advance our solutions far more effectively than any other partner we have worked with. ”

**Colin Shephard**

VP of Product

## Ready to Proceed?

Schedule a discovery call to define your Salesforce footprint and objectives. We'll finalise scope, pricing, and timing, typically ready to begin **within 2–4 weeks** of approval.



**8 WEST CONSULTING**

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