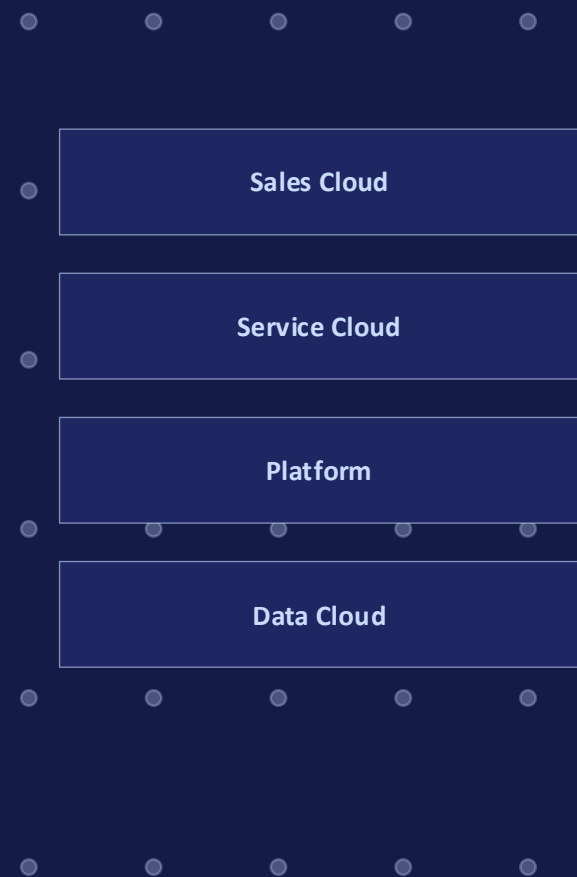


SALESFORCE ADVISORY PRACTICE

Salesforce Org & AI Readiness Assessment

Framework & Methodology

May 2026 | CONFIDENTIAL



Why AI Initiatives Fail in Salesforce Orgs

87%

of organizations use
some form of AI

*>50% say dirty data
blocks their results*

01

Data Quality Gaps

Einstein requires field completion above 70% and 1,000+ qualifying outcomes. Most orgs fall short.

02

Technical Debt

Conflicting automations and ungoverned customizations create instability that AI exposes.

03

License Waste

Most orgs with Einstein licenses have key features disabled — paying for unused capability.

Three Workstreams. One Composite Score.

01

ORG HEALTH

WEIGHT: 30%

Technical & Architectural Health

- Security posture & permissions
- Technical debt inventory
- Governor limit exposure
- Integration architecture
- DevOps maturity

02

DATA HEALTH

WEIGHT: 40%

Data Quality & Governance

- Field completeness rates
- Duplicate & standardization
- Historical data depth
- Data lineage & governance
- GDPR/CCPA posture

03

AI READINESS

WEIGHT: 30%

Einstein & Agentforce Readiness

- License eligibility audit
- Einstein Trust Layer
- Data Cloud configuration
- Agentforce prerequisites
- AI organizational maturity

AI Readiness Tiers

85–100

AI-Ready

PROCEED

Deploy AI features immediately. Focus on optimization and adoption.

70–84

Conditionally Ready

CONDITIONAL

Address specific gaps in parallel with a phased AI rollout.

55–69

Remediation Required

REMEDiate FIRST

6–12 week remediation sprint before any AI enablement.

0–54

Not Ready

FOUNDATIONAL WORK

Foundational overhaul of data, architecture, or governance required.

RECOMMENDED TOOLING

Best-in-Class Stack

TOOL	CATEGORY	PRICING (2026)	PRIMARY USE
Salesforce Optimizer + Health Check	Native	FREE	Baseline security, metadata bloat, limit risk
Einstein Readiness Assessor	Native	FREE	Feature eligibility, data readiness gaps
Gearset	DevOps / Audit	\$150-\$600/org/mo	Metadata comparison, 300+ type scanning
Validity / DemandTools	Data Quality	\$3K-\$8K/year	Deduplication and data cleansing at scale
Clientell AI	AI-Powered Admin	\$99-\$999/month	AI-driven admin automation & execution
Salesforce CLI	Dev Tooling	FREE	Full metadata inventory export, org interrogation

Estimated engagement tooling cost: \$2,300-\$5,000 | 5-10% of total \$25K-\$75K project cost

What Every Engagement Produces

01

Org Health Scorecard

Per-domain breakdown across security, technical debt, integrations, DevOps

03

AI Readiness Score

Composite tier classification with workstream breakdowns and blocking gaps

05

AI Use-Case Matrix

5–10 ranked use cases with feasibility scores, ROI estimates, build vs. buy

07

Quick Wins Breakdown

Initiatives achievable in 30–90 days, including underutilized licensed features

09

Next-Phase SOW

Scoped statement of work for remediation and AI deployment engagements

02

Data Quality Report

Field-level analysis with completion rates, duplicate metrics, remediation priorities

04

Risk Register

Prioritized risk log with severity, business impact, and effort estimates

06

Phased Roadmap

90-day, 6-month, and 12-month plan tied to scores and use-case priorities

08

Executive Readout Deck

Board-ready presentation summarizing findings, scores, and recommended roadmap

10

Data Remediation Backlog

JIRA-ready task list for data cleanup with effort estimates and owner assignments

READY TO ASSESS YOUR ORG?

Next step — find a partner who will begin with a no-cost scoping call to confirm org access, stakeholder availability, scope, and initial estimate. Once you are comfortable, the engagement should deliver actionable insights and a roadmap to success.

DURATION

3–6 Weeks

SCOPE

**Sales, Service,
Platform, Data**

OUTPUT

**6–10 Actionable
Artifacts**