PIVOTAL PERFORMANCE
HEALTH CHECK SERVICES

Designed for clients who demand tangible business results. Optimize system performance, increase productivity, and boost adoption.

MAXIMIZE THE VALUE OF YOUR TECHNOLOGY INVESTMENT

As one of our most popular services with customers, we created the Pivotal Performance Health Check (PHC) with the understanding that a CRM system is a dynamic entity requiring maintenance, upkeep, and adjustment to operate at peak performance. We also know your business demands this level of performance from your technology investment — this is where our seasoned CRM consultants come in.

First, we work to prevent problems before they begin, keeping your business running smoothly without interruption or slowdown. Second, we optimize your system's performance using strategies specific to the way your business operates. Third, we offer regular maintenance to ensure you are always ahead of the curve. Finally, we provide an in-depth analysis of your system with detailed recommendations to ensure you're realizing every possible benefit from your technology investment. And we do all this for a fixed price in just five days.

IMPROVED PERFORMANCE, RELIABILITY, AND VALUE

Pivotal Performance Health Check services ensure that all areas of your system are fully functional and operating efficiently. We review your entire system, including your servers, network, clients, configuration settings, performance, and operating procedures. After this review is complete, we provide you with a thorough analysis and recommendations for how to maintain, enhance, and optimize your Pivotal system, including troubleshooting potential issues, identifying risk factors, and investigating areas of your system that are or may become problematic.

In addition to the benefits our technical experts bring to your business, we also work with your internal team to ensure they have the tools they need to keep performance at peak levels after we leave, including educational services and diagnostic tools to perform the follow-up performance testing and detailed analyses that ensure you see maximum ROI from your technology investment.
DAY ONE

On the first day of the Pivotal Performance Health Check project, our seasoned technical consultants will provide you with a working agenda that defines the scope of the analysis to be performed on your system, as well specific action items for the following four days. We’ll make sure you always know exactly what to expect throughout this process.

DAYS TWO THROUGH FOUR

During the next three days, we’ll review your systems either on site or through an off-site virtual visit. This allows us to gather and analyze information, as well as diagnose any potential problems and areas for improvement. We also review your system’s configuration settings, your operating procedures, possible hardware modifications, your satellite environment, and overall system performance.

Tokara’s PHC service includes troubleshooting, risk analysis, investigating the cause(s) of any problems that arise, and performing adjustments to optimize the system. While on site, we’ll fix any issues we find and prepare a detailed report for your review. This report includes the Pivotal system configurations, any changes we made to enhance your system’s performance, and recommendations for both short-term and long-term improvements.

DAY FIVE

In order to ensure we are able to optimize your system as quickly as possible, day five is packed with activities. First, we compile all of our recommendations based on data collected to that point. Areas that may need attention include hardware, backups and disaster recovery, archiving and truncating data, indexing, removing duplicate records, customization, monitoring, and more. At this stage of the project, we also provide you with an estimate for implementing these recommendations in the future.

Next, we present the Pivotal Performance Health Check Report, which includes a complete review of our findings. We also educate your team, providing training to improve overall knowledge of how to manage a Pivotal system and steps for ensuring that the system is always functioning at optimal levels. We also provide your team with diagnostic tools to make sure you can perform follow-up performance testing and detailed analyses for your system — all included in our low-risk, fixed-fee model.

ASK US ABOUT PIVOTAL PERFORMANCE HEALTH CHECK BENEFITS

To learn more about the real business results our clients see from our Pivotal PHC services, please contact any member of our consulting team at info@tokarasolutions.com, or call +1 (877) 330-1203.