

FONTEVA HEALTH & READINESS ASSESSMENT

Your Fonteva system is powerful, but complexity can hide inefficiencies, errors, and risks that grow over time. Whether you've recently implemented Fonteva or inherited an existing system, a structured assessment gives you a clear picture of your environment and a roadmap to improvement.



WHAT'S INCLUDED

- 
Configuration Audit
 Full review of key Fonteva objects, automations, page layouts, and permissions to identify issues and bottlenecks.
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Data Integrity Review
 Analysis of record consistency, duplicates, and critical data quality issues impacting reporting and operations.
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Automation & Process Check
 Evaluation of triggers, flows, and process builders to ensure stability, maintainability, and compliance with best practices.
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Security & Access Review
 Verification of profiles, sharing rules, and user roles to ensure the right people have the right access.
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Actionable Findings Report
 A prioritized list of recommendations with impact ratings and next steps, so you know exactly what to address first.


WHAT YOU'LL GAIN

- Clear Priorities:** Understand which fixes and improvements will yield the biggest impact.
- Fast Decision-Making:** Receive a roadmap that informs your next phase, whether stabilization, optimization, or support.
- Peace of Mind:** Independent confirmation that your system is sound (or insight into what needs attention).
- Immediate ROI:** Avoid spending on the wrong projects or duplicated efforts.

	Duration	Starting Price	Deliverables
Engagement Overview	2-3 weeks	\$3,500 fixed	Findings Report, Health Scorecard, and 1-Hour Review Session

Let's Start with Clarity

Get the insight and confidence you need to make the right Fonteva decisions. After your assessment, Acadia Bay can help you take action with a Fonteva Stabilization Package or Success Plan.

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