



STRATEGIC . SALESFORCE . PARTNER .

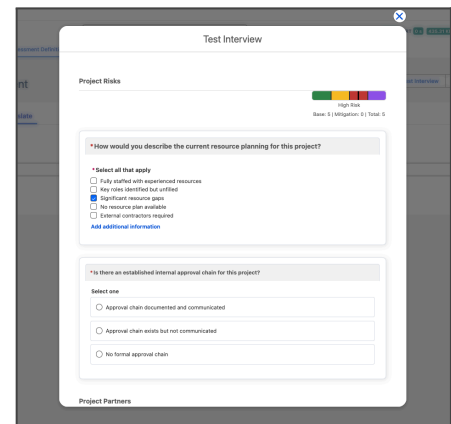
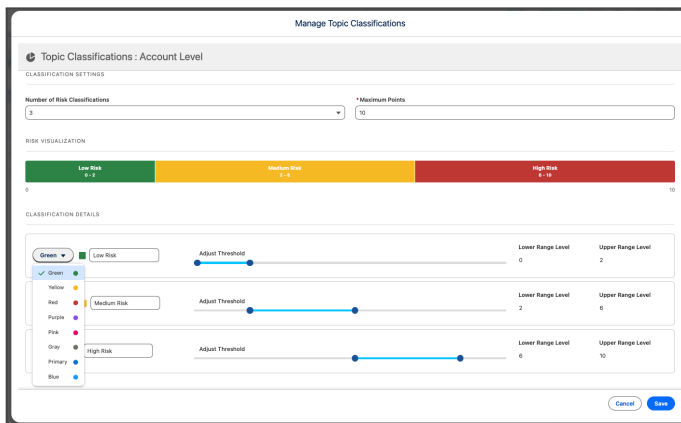
Risk Assessment Tool

Structured risk qualification — built into every Salesforce workflow.

AT A GLANCE

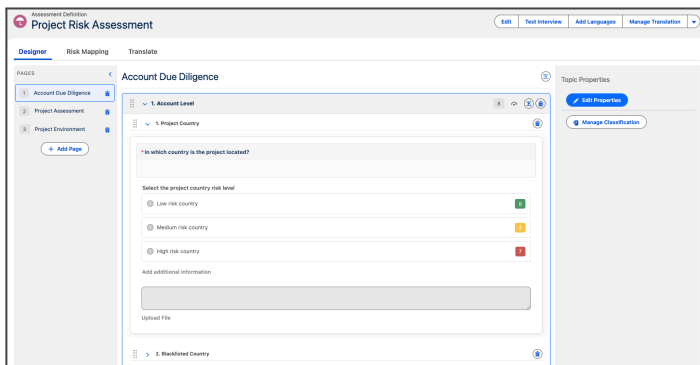
Risk is everywhere in your business — yet most teams lack a consistent, auditable way to capture, score and act on it. The Risk Assessment Tool closes that gap. Built natively on Salesforce, it lets you design structured questionnaires, attach them to any object, guide users through a guided interview, and store every response in an audit-proof record — all without leaving your CRM.

No spreadsheets. No email threads. No guesswork. Just a clear, weighted risk score — visible to every team member at exactly the moment it matters.



RISK ASSESSMENT TOOL - FEATURE TOUR

Designed for adoption · The Risk Assessment Tool is built around four principles: keep the user in context, guide them through structured questions, score risk transparently, and store every response in a tamper-proof audit trail. No training required.



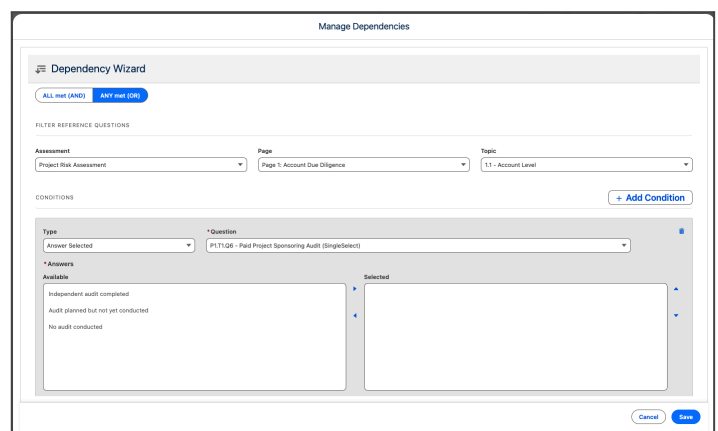
DESIGN · BUILD

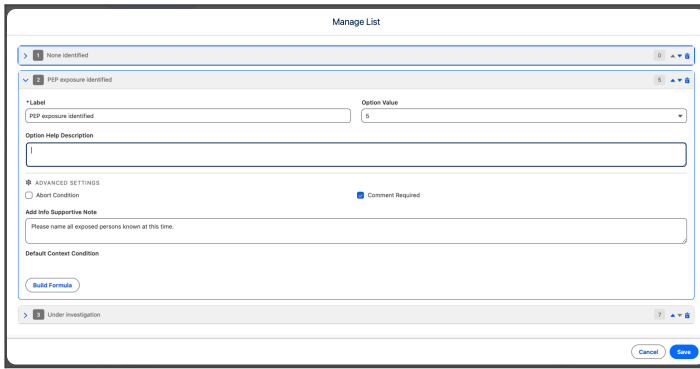
A visual questionnaire designer for any risk scenario. Assessment definitions live as standard Salesforce records. The built-in Assessment Designer lets administrators compose questionnaires from scratch — structuring them into pages, grouping questions into risk topics, and defining multi-level risk classifications with custom labels and colour codes. Drag-and-drop ordering keeps the design process fast, even for complex catalogues.

LOGIC · DEPTH

Dependent questions that adapt to every answer

Every question can spawn sub-questions based on the answer selected — and those sub-questions can spawn further sub-questions, to any depth. The Dependency Manager gives a crystal-clear view of which answer triggers which follow-up, whether that follow-up is a single question or an entire topic section. Questions can be marked required, toggled active or inactive, and enriched with a help-text tooltip for guided self-service.





SCORE · WEIGH

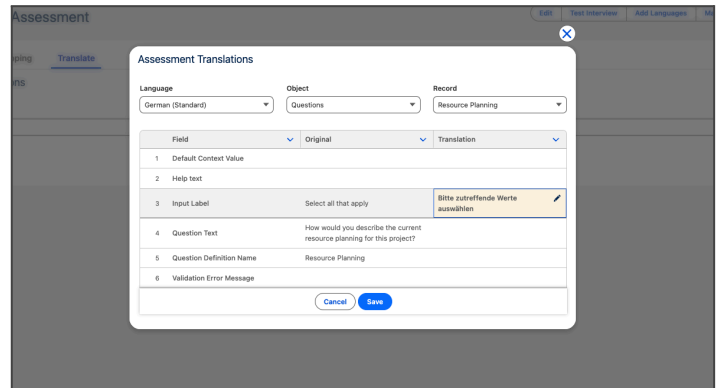
Weighted risk scores calculated automatically

Each answer option carries a point value that rolls up to its risk topic. Topics combine into an overall risk score, visible on the interview record as soon as the assessment is submitted. Mitigation questions can reduce – though not eliminate – the risk contribution of earlier answers, reflecting the nuance of real-world risk management. Administrators can define as many risk levels as needed, name them, and assign colours for instant visual recognition.

TRANSLATE · LOCALISE

Full multilingual – questions, answers, pages and topics

Assessments are fully translatable. When an assessment is authored in one language, administrators can add further languages and provide translations for every text element – question wording, answer options, page titles and topic descriptions. The correct language is served automatically based on the user's locale setting in Salesforce, so global teams work seamlessly in their own language without duplicating assessment definitions.



USE CASES

01 SALES · OPPORTUNITY RISK

Qualify risk before every deal advances

Attach a risk assessment to any Opportunity to evaluate partner reliability, country-specific technical challenges, compliance exposure and supply chain integrity – before a deal progresses to the next stage. Sales managers see a weighted score on the record and can set stage-gate rules that block advancement until risk is formally assessed and documented.

02 COMPLIANCE · DUE DILIGENCE

Supplier and partner onboarding with a full audit trail

Run structured due-diligence questionnaires against Account or Contact records during onboarding. Questions cover financial stability, regulatory compliance, data protection practices and ESG criteria. Every answer is stored in an immutable interview record – ready for internal audits, regulatory inspections or contractual evidence requirements, without any manual document assembly.

03 PROJECTS · TECHNICAL ASSESSMENT

Capture project risk at the point of estimation

Embed a technical risk assessment in the project initiation workflow on any custom Project object. Topics can cover infrastructure complexity, third-party dependencies, resource availability and geographic constraints. The resulting risk score surfaces immediately to project sponsors, enabling better resourcing decisions before a single line of code is written.

04 SUSTAINABILITY · ESG SCREENING

Screen for indigenous rights, labour standards and environmental impact

Configure an ESG assessment that covers labour practices, environmental impact, indigenous rights protection and local regulatory alignment. Run it against any partner, supplier or project record. Mitigation questions allow respondents to document controls already in place – reducing the net risk score and providing auditors with a complete, evidence-backed picture of your ESG posture.