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Salesforce Org Assessment

Methodology, Processes, & Deliverables

An outline of our methodology to conduct a deep Salesforce Org assessment including tools, data/metadata, business processes, automation, security, user experience, clouds/licenses, & future road mapping.

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INTRODUCTION

Welcome to our Salesforce Org Assessment solution. This report encapsulates our process for conducting a deep analysis of any Salesforce Org with adherence to client key security policies, business processes, data/metadata, Salesforce clouds/licenses, & end user experience.

Purpose of the Assessment

The primary objective is to gain insights into the effectiveness & efficiency of your Salesforce Org configuration & processes. Every Salesforce Org should be periodically analyzed & scrutinized to ensure it is delivering maximum efficiency for users while reporting accurate results to leadership – enabling them make data-driven decisions for the business. Finally, the assessment aims to deliver a roadmap for future enhancements, cost savings, & increased Salesforce ROI.

Assessment Scope

The assessment combines a spectrum of critical business processes, user experience, & data/metadata analysis, including but not limited to security, data/metadata regulation, technical debt, legacy customizations, managed packages/Apps, Salesforce OOB (out of the box) features & functionality. Each area is investigated to gauge alignment with overall business goals, budget, & industry best practices.

"Our Salesforce Assessment was completed in 2 weeks and gave us a deep understanding of our current configuration and what Salesforce enhancements can improve for our users' adoption of the system."

High Tech Manufacturer.

Salesforce Assessment

1. Data/Metadata
2. User Workshops
3. Salesforce Licenses
4. Business Process Automation

IT Architectural Diagram



CRM Data Landscape

90%

“Nearly 90% of data pros reported difficulty with data scaling and complexity, and more than 4 in 5 pointed to data governance and compliance issues.” – CIO Dive

80%

“Four in 5 respondents said siloed data impeded digital transformation and 3 in 5 respondents reported their data systems are not yet configured to fully leverage emerging AI capabilities.” -Gartner

43%

“43% of CRM customers use fewer than half the features they have on their CRM.” - Kylas

80%

“Nearly 80% of data teams spend more than half their time preparing data rather than generating insights. “ - Gartner

68%

“68% of vice presidents in charge of AI or data management already see their companies making decisions based on bad data all or most of the time, versus 47% of C-level IT leaders.” – SF Ben

27%

“27% of developers agreed that the biggest challenge with Salesforce development is working on top of years of technical debt.” – SF Ben

Assessment Solution Methodology

1 User Workshops

Salesforce "Power User" & department head workshops highlight "A Day in the Life" user experience to gather insights on implementation, challenges, & success areas.

2 Salesforce Clouds & Licenses

A review of current Salesforce Clouds, Licenses, Features, & Add-on Products provides clarity, relevance, & adoption levels to maximize investment.

3 Data / Metadata Analysis

Analysis includes Managed Packages/Apps, Objects, Fields, Page Layouts, OWDs, Sharing Rules, Permission Sets, Integrations, Apex Classes/Triggers, Tech Debt & Legacy Customizations.

4 Business Process Enhancements

External and Internal Business processes automation (Workflow Rules, Process Builders, & Flows) are analyzed for accuracy, completeness, & recency.

Summary

A detailed recommendations list with a roadmap and cadence for improving your Salesforce Org.

Each recommendation includes the current state, reason for change, and benefit post-change. This methodology enables business leadership to make data-driven decisions for the future.



Assessment Cases

Client 1:
Energy & Mining Industry**Assessment Goals:**

- Consolidate multiple Salesforce Orgs
- Upgrade to latest Salesforce OOB functionalities
- Reduce tech debt & manual entry

Results:

- Replaced classic customizations with Lightning features (flow, lightning components)
- Archived legacy data & cleaned-up/deleted metadata technical debt
- Increased user productivity & efficiency via object, page, field visibility
- Decreased objects, record types, page layouts, and fields
- Upgraded all users to Salesforce UE licenses

**Client 2:**
High Tech Manufacturer**Assessment Goals:**

- Finalize classic to lightning conversion
- Replace legacy customizations with OOB
- Reduce tech debt, increase automations

Results:

- Replaced classic customizations and coding with lightning OOB functionalities
- Increased user adoption via manual process automations, work queues/teams, record search improvements, knowledge/articles, in-app help/training
- Retired or upgraded apex classes and triggers to latest version
- Archived legacy data & cleaned, merged, deleted metadata technical debt
- Enabled AgentForce AI activation

User Workshops

Workshop Goal

Understand the Salesforce user experience including System Administrators, Power and Daily Users, Department Heads, and Executives.

Workshop Steps

- Conduct "Day in the Life" 1-hour sessions with selected Salesforce users.
- Capture in-app screen "clicks" including objects, records, processes with focus on job productivity, automation, and impediments.
- Gather user areas for Improvement and enhancements and prioritize by efficiency gain and implementation cost.

Workshop Deliverables

- Analyze and consolidate user sessions into Salesforce categories: clouds, apps, themes, job requirements, profiles, and usage.
- Document legacy or out of date configurations, coding, apps, packages, etc.
- Map user processes with Salesforce OOB features and benefits.
- Organize solutions into actionable project fixes with cadence and cost.



Clouds and Licenses Audit

Maximizing Salesforce Licenses

- Review active contracted clouds, licenses, & add-ons.
- Audit license types with feature descriptions, active vs. inactive usage.
- Group internal and external users by profile, role, security & usage.
- Match each license to a Salesforce profile & user.
- Review OWDs & security and map to IT policies for compliance.

Salesforce License Contract (Example)

PARTNERSHIP SUMMARY EXAMPLE	
Contract Breakdown	Renewal Date
Sales Cloud EE (Qty 225)	10/31/2026
Service Cloud EE (Qty 150)	10/31/2026
Customer Community EE, 100 Members (Qty 1)	10/31/2026
Customer Community EE, 20K Logins/mth (Qty 1)	10/31/2026
Partner Community EE, Logins/mth (Qty 1)	10/31/2026
Slack Business Plus (Qty 100)	10/31/2026
Revenue Cloud EE (Qty 50)	10/31/2026

A Complete Salesforce License Audit Results in Maximizing ROI For Utilization & Future Budget

Data and Metadata Analysis

Data, Metadata

- Extract and Analyze all Data/Metadata (Salesforce Health Check, Scale)
- Utilize 3rd party scanning and remediation tools
- Review Objects, Page Layouts, Fields, Record Types, Picklists, etc.
- Identify Usage, Technical Debt, Duplicates, Legacy Customizations
- Audit Security: OWDs, Sharing Rules, Profiles, Permission Sets, Permission Groups, Visibility, and Validation Rules
- Organize Visual (Summary, Tabular, Bar, Pie Charts) Tables
- Highlight Unused Data/Metadata for Updating, Replacement, Archiving or Deletion.

Apps, Managed Packages, Automation

- Extract and Review Managed Packages/Apps, APEX Classes and Triggers, Workflow Rules, Process Builder, and Flow
- Review Salesforce Flow Performance, Error Console/Logs,
- Identify Unused Managed Packages (paid and unpaid), Legacy Apps, Flow Overlap and Sprawl, Security Threats, etc.
- Organize Visual (Summary, Tabular, Bar, Pie Charts) Tables
- Highlight Customizations (APEX, VF Pages, etc.) for Updating, Replacement, Archiving or Deletion.

Deliverable: Recommendations with Cadence for Clean-Up, Upgrades, and On-Going Org Maintenance

Process Automation

Automating business processes using the latest Salesforce declarative (point & click) tools & configurations are essential to every Salesforce Org. The assessment documents step-by-step automation processes with designated business outcomes.

Artifacts and Documentation

Initially, We gather any legacy or active process documentation artifacts that may be available. Analysis & comparison to your current business processes is conducted to ensure necessary recommendations.

Oftentimes, we find legacy configurations, tools, & automations requiring upgrades (or even retired) to the latest Salesforce features & functionalities.



Several Specific Areas Requiring Attention:

- **Workflow Rules & Process Builders:** Check for consolidation & migration to flows
- **APEX Triggers:** Inspect for recency, version, consolidation & migration
- **Visualforce pages:** Consider replacement to Lightning Web Components
- **Approval Processes:** Review usage, accuracy & timeliness
- **Lead Conversion:** Examine for accuracy & adherence
- **Case Assignment & Escalation:** Evaluate users, groups, & OOB new features

Deliverables

Assessment Deliverable 1

Assessment Documentation:

- Format: Word or similar
- Table of Contents
- Salesforce Clouds & Licenses
- User Workshops
- Data & Metadata Reports & Charts
- Recommendations
- Future Roadmap by Phases

Tip:

The document can also serve as a "guide" for a Salesforce delivery team to create an agile project implementation with Epics, User Stories, Tasks, Sub-Tasks, etc.

Assessment Deliverable 2

Executive Summary:

- Format: Powerpoint or Similar
- Summary of Documentation
- Recommendations with Benefits
- Scorecard by Department/Team
- Future Roadmap by Phase with Costs
- Next Steps

Tip:

The Powerpoint serves as a high-level summary of the Assessment Documentation. Emphasis on solving current business problems with related benefits.

Conclusion

Thank you for your interest in our Salesforce Org Assessment. Our unique methodology allows a personalized approach to your Salesforce org based on your Salesforce clouds, licenses, usage, system integrations, business processes that align with your goals, KPIs, and budget.

Most Salesforce Orgs have endured years of configurations due to changes in the business, mergers & acquisitions, IT staff turnover, multiple consulting service providers, etc.

We highlight the key areas of achievement (areas that are working properly) as well as identify opportunities for improvement.

Finally, every assessment should be "living document" that receives periodic updates by business stakeholders driving future Salesforce enhancements & budget.

About



CRM Architects: a US-based firm delivering Salesforce advisory and consulting services.

Our mission is to provide exceptional services and solutions that empower our clients. Our Architect-Led approach delivers comprehensive and expedited solutions at a much lower cost.

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your Salesforce Org
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