



CRM Leadership Series 1 of 4 "Salesforce Org Assessment"

Salesforce Org Assessment

Methodology, Processes, and 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, and 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 strict adherence to client key security policies, business processes, data, metadata, Salesforce clouds, licenses, and the end-user experience.

Purpose of the Assessment

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

Assessment Scope

The assessment combines a spectrum of critical business processes, user experiences, and data and metadata analyses, including, but not limited to, security, data and metadata regulation, technical debt, legacy customizations, managed packages, applications, and out-of-the-box (OOB) features and functionality. Each area is investigated to gauge alignment with overall business goals, budgets, and 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 our users' adoption of the system."

High Tech Manufacturer.

Current Trends

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

40-60%

"Within their projects, AI and data teams spend from 40-60% of their time cleaning and preparing data." – DQE Unlock AI Success With Clean Salesforce Data, 2026

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

66%

"66% of organizations are deploying AI to oversee data management and knowledge bases." – [Salesforce.com](https://www.salesforce.com/resources/research-reports/state-of-service-ai-agents-edition/), "State of Service: AI Agents Edition", 2026

27%

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

80%

"4 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

63%

"63% of service professionals with AI agents say data readiness is a major block to agent adoption." – [Salesforce.com](https://www.salesforce.com/resources/research-reports/state-of-service-ai-agents-edition/), "State of Service: AI Agents Edition", 2026

Assessment Solution Methodology

1

User Workshops

Salesforce “Power User” and department head workshops highlight the “day-in-the-life” user experience to gather insights on implementation, challenges, and success areas.

2

Salesforce Clouds and Licenses

A review of current Salesforce clouds, licenses, features, and add-on products provides clarity, relevance, and adoption levels to maximize investment.

3

Data and Metadata Analysis

Analysis includes managed packages, applications, objects, fields, page layouts, OWDs, sharing rules, permission sets, integrations, Apex classes and triggers, technical debt, and legacy customizations.

4

Business Process Enhancements

External and internal business process automation (Workflow Rules, Process Builders, and Flows) are analyzed for accuracy, completeness, and 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 and Mining Industry

Assessment Goals:

- Consolidate multiple Salesforce orgs.
- Upgrade to the latest Salesforce OOB functionalities.
- Reduce technical debt and manual entry.

Results:

- Replaced classic customizations with Lightning features (Flows, Lightning Components).
- Archived legacy data and cleaned up or deleted metadata technical debt.
- Increased user productivity and efficiency via strategic object, page, and field visibility.
- Decreased unneeded 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 alternatives.
- Reduce technical debt and increase automation.

Results:

- Replaced Classic customizations and custom code with Lightning OOB functionalities.
- Increased user adoption via manual process automations, work queues, teams, record search improvements, knowledge articles, and in-app help and training.
- Retired or upgraded Apex classes and triggers to the latest versions.
- Archived legacy data and cleaned, merged, or deleted metadata technical debt.
- Enabled Agentforce AI activation.



User Workshops



Workshop Goal

Understand the Salesforce user experience, including system administrators, power users, daily users, department heads, and executives.

Workshop Steps

- Conduct "Day in the Life" one-hour sessions with selected Salesforce users.
- Capture in-app screen clicks—including objects, records, and processes—with a focus on job productivity, automation, and impediments.
- Gather user areas for improvement and enhancements, prioritizing them by efficiency gains and implementation costs.

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, custom code, apps, and packages.
- Map user processes with Salesforce OOB features and benefits.
- Organize solutions into actionable project fixes with a clear operational cadence and cost projection.

Clouds and Licenses Audit

Maximizing Salesforce Licenses
Review active contracted clouds, licenses, and add-ons.
Audit license types with feature descriptions, active vs. inactive usage.
Group internal and external users by profile, role, security and usage.
Match each license to a Salesforce profile and user.
Review organization-wide defaults (OWDs) and security, mapping them 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 and Future Budget.

Data and Metadata Analysis

Data and Metadata

- Extract and analyze all data and metadata (Salesforce Health Check, Scale)
- Utilize third-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 findings into visual tables (including Summary, Tabular, Bar, and Pie Charts)
- Highlight unused data and metadata for updates, replacement, archiving, or deletion

Apps, Managed Packages, and Automation

- Extract and review managed packages, apps, Apex classes, Apex triggers, workflow rules, process builders, and flows
- Review Salesforce Flow performance, the flow error console, and system logs
- Identify unused managed packages (paid and unpaid), legacy applications, automation overlap, flow sprawl, and security threats
- Organize findings into visual tables (including summary, tabular, bar, and pie charts)
- Highlight custom code developments (Apex, Visualforce, etc.) for updates, 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-and-click) tools and configurations is essential to every Salesforce org. The assessment documents step-by-step processes with designated business outcomes.

Artifacts and Documentation

Initially, we gather any legacy or active process documentation available. Analysis and comparison to your current business processes are conducted to form accurate, necessary recommendations.

Often, we find legacy configurations, tools, and automations that require upgrades or retirement in favor of the latest Salesforce features and functionalities.

Specific Areas Requiring Attention:

- **Workflow Rules and Process Builders:** Evaluate for consolidation and migration to Flows.
- **Apex Triggers:** Inspect for recency, API version, consolidation, and migration.
- **Visualforce Pages:** Consider replacement with Lightning Web Components (LWCs)
- **Approval Processes:** Review usage, accuracy and timeliness.
- **Lead Conversion:** Examine for accuracy and adherence.
- **Case Assignment and Escalation:** Evaluate users, groups, and out-of-the-box (OOB) features



Deliverables and Results

Deliverable 1

Documentation:

- Format: Word or Similar
- Table of Contents
- Salesforce Clouds and Licenses
- User Workshops
- Data and Metadata Reports
- Recommendations
- Future Roadmap by Phase

Tips:

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.

Deliverable 2

Executive Summary:

- Format: PowerPoint or Similar
- Summary of Documentation
- Recommendations with Associated Benefits
- Scorecard by Department
- Future Roadmap by Phase with Cost
- Next Steps

Tips:

The PowerPoint serves as a high-level summary of the assessment documentation, with an 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, and business processes to align with your goals, KPIs, and budget.

Most Salesforce orgs have endured years of configuration due to changes in the business, mergers and acquisitions, IT staff turnover, and transitions between multiple consulting service providers.

We highlight key areas of achievement (configurations working properly) while identifying strategic opportunities for improvement.

Finally, every assessment should be a "living document" that receives periodic updates from business stakeholders to drive future Salesforce enhancements and budgets.

If you would like an assessment of your Salesforce org, please contact us.



Salesforce Org Assessment

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