Cloudalyze

Salesforce.com Journey? Let us be your guide...

A salesforce health check could be just what the doctor ordered

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A Salesforce Health Check could be just what the doctor ordered
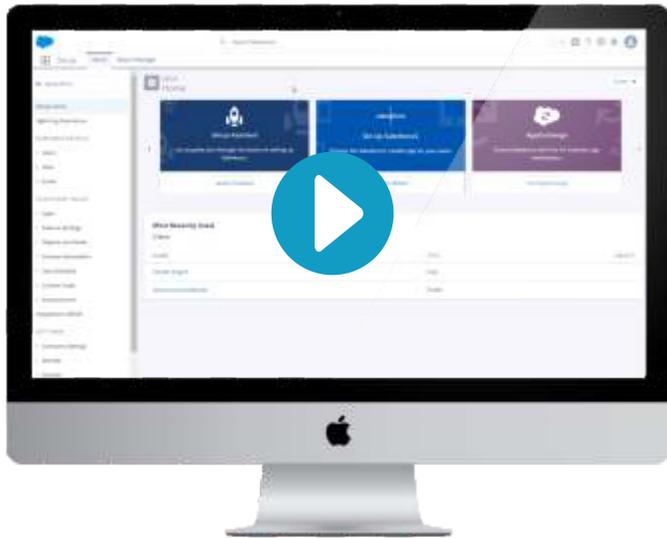
Are you following
BEST PRACTICES?

Do you know
WHAT'S IN YOUR DATABASE?

Are you using Salesforce®
TO ITS FULLEST POTENTIAL?

If you have said no to any of these questions it's time to evaluate the health of your Salesforce environment. We know that business strategies evolve and you will want to change your tactics and processes to meet those demands, but have you aligned your processes in Salesforce® for a smooth roll out?

Regularly conduct the following :

(At least Monthly)

▶ Security
Health Check

https://goo.gl/eiK837

Follow this simple video and adhere to recommendations. If you need higher than average security, create your own baseline and follow the same steps.

For more information go here https://goo.gl/4j5b2U

MOST IMPORTANT

Run Security Health check more often than everything else.

▶ Information
Visibility Check

☑ DO's

- ☑ Keep Optimal 5-7 Role Hierarchy Level
- ☑ Keep Minimal & Simple sharing rules
- ☑ Build essential integrations using a separate user profile with requisite visibility
- ☑ Leverage Public Groups wherever applicable
- ☑ Minimize ADMIN profiles and users

☒ DON'Ts

- ☒ Avoid ownership skew & One user owning multiple records
- ☒ Avoid creating unnecessary custom profiles
- ☒ Avoid creating excessive Permission sets
- ☒ Be careful while sharing Externally
- ☒ DO NOT hard code any sharing rules

Performance & Scalability
Check

Regularly conduct an evaluation to see if you are following these best Practices.

Monitor data volumes

- ❖ For key objects - Tasks, Leads, Opportunities, Quotes
- ❖ Track notes and attachments that are being uploaded
- ❖ Avoid uploading unnecessary attachments to objects by creating Best Practice Policies

Avoid custom APEX code

- ❖ Avoid writing custom APEX code unless necessary
- ❖ Utilize advanced patterns like "Continuation Pattern" & "Platform Cache" to maintain and improve performance & scalability

Usage And Consumption

Health Check

Monitor Login History and Salesforce Usage

■ Review OOB login reports to check which users have not logged in recently

■ Incentivize regular usage.
Install and Review Adoption Dashboards periodically

■ One time data clean up and data deletion via scheduled data loader jobs/ ETL tools AppexchangeApps for archival/ leverage data export functionality

Monitor Login History and Salesforce Usage

Offload data to Heroku/Canvas app for viewing data https://goo.gl/GWzrBf

Similarly you can offline data to internal databases (eg DBAmpfor SQL Server integration)

Identify & Archive Data regularly

■ Measure "archivable" data for one object

■ Create reusable dashboards to determine what data to archive

■ Create a data archiving or deleting process

■ Determine the best tools to execute this process

Accounts
no activity in past 3 years

Archived tasks & event
older than 5 years

Closed cases
older than 5 years

ARCHIVE

Unconverted leads
no activity in past 12 months

Dead opportunities
no activity in past 12 months

Designed to Deliver Guidance and Recommendations on Maximizing your Salesforce CRM Investment

Salesforce CRM Health Evaluation service helps organizations identify any gaps limiting the productivity of your CRM. Our evaluation analyzes the problems specific to your company's deployment of Salesforce CRM and identifies the opportunities available to recognize the desired advantages from the CRM.

Know More ➡️

Other Whitepapers ➡️

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