Declutter your Salesforce.org

Salesforce can be a little more complex than you expected. Not having an expert to manage it, might lead to unintended consequences instead of simplifying your common business goals. Sometimes, the pressure of business can make even a trained admin focus less on what matters more in managing the platform.

Have you taken a stock of the number of profiles, roles, required fields, rules, and triggers lately? And did the results amaze you? – In high probability, YES.

You might be faced with one or a few or all of the below situations:

- Old, Outdated or Bad Data
- Incomplete or Irrelevant Data
- Duplicate Data
- Incorrect or Confusing Information
- Unused Components
- Complex Business Processes
- Not-so-simple Daily Operations

The complexity of the system built over the years is not only slowing you down, but also is a security risk.The above can result in dreary user experience,meaningless reporting and dwindling users' trust levels. All these can make your organization sink much faster than expected. Before losing faith in Salesforce, consider working with a partner who can help you declutter your processes and your data.

- Standardize and adhere to data policies
- De-dupe, transform, enrich, integrate, automate and validate the data
- Data mapping for each relationship and data type
- Identify use and relevance of each data field
- Maintain data entry standards
- Do away with or archive unnecessary data

You might want to include Cloudingo, Field Trip or Salesforce Labs' free Data Quality Analysis Dashboardsin your data cleansing toolkit.

Processes

You might witness multiple triggers set per object; often by people no longer with you.Too many users might have been given the system admin rights. Many a times, you might notice processes with no idea of their use or quality. There might not be a system in place to deactivate users.

Other than the inconsistencies issue, user needs and business goals also change over time. If Salesforce is not at the forefront of discussions, organization will not adjust well with this change and advancement. Business processes need to be kept relevant and neat to get full advantage of the Salesforce platform.

Reports

The ease with which the reports can be created and used in Salesforce increases the chances of reporting side becoming messy, quickly. To get a clear view of your performance, the data being used for reporting should be clean, complete and validated. Other than this, permissions to modifythe data to various departments needs to be given carefully. Also, following proper report folder structure and naming conventions will make the task of identifying the correct data set and report easier and faster.

Your system will evolve over time and so should Salesforce. Keeping the Salesforce platform useful and clean, and fixing the mess, whenever required, is a long-term, ongoing project. By being a little more mindful and watchful, you can make Salesforce do all and more than what you ever wanted.