Five Tips to Quickly Streamline Your Salesforce® Instance

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Tip # 1: Identify Objects & Fields Not Used

Two Thirds of Fields are Used Less than 5% of the Time

In a recent analysis of multiple client Orgs, we identified that less than 33% of fields were being populated on more than 5% of the total number of available records and also found on average, another 33% of fields were *never populated*- no data in them whatsoever - on even a single record.

Determine Why Objects and Fields Fell Out of Use

We identified several reasons for a lack of field/object use; they may refer to obsolete products, or could be duplicated somewhere else - common for fields such as 'Competitor' which can often be found on each of the Lead, Account and Opportunity objects, requiring a user to fill it in three times.

Some fields existed because a disconnected legacy system required them at one time, but the most common reason for fields becoming irrelevant and unused was simply because they asked for collection of non-critical (and sometimes even ridiculous) information.

Tip # 2: Reduce Data Security Risk

Rein in 'Out of Control' Roles, Profiles and Permission Sets

Many companies create roles and profiles for Salesforce users that mirror job titles; it is not uncommon to have a separate profile for Marketing VP, Marketing Director, Direct Mail Manager, etc. all which have the same permissions. Create Profiles based on the level of access required such as, Marketing User-*Full Access*, Marketing User-*Limited Access*, etc.

The fewer the number of Roles and Profiles in use, the easier it is to ensure that data that should be off-limits is not visible.

Reduce Number of Record Types and Page Layouts

In conjunction with a runaway number of Roles or Profiles, we frequently see Record Types and Page Layouts which have been created for individual users, but which have few differences in what is being presented. Best practices dictate that visibility into fields and objects should be controlled at the Profile level or via Permission Sets, not by creating numerous Record Types or Page Layouts.

Tip # 3: Free Up Storage by Deleting Old Items

Remove Old Records

Salesforce has storage limits. If you exceed your allotted storage, you could be facing additional costs. Run reports on Accounts, Leads, Contacts, Opportunities and Cases which include the created date and the date the record was last modified to identify old records which can be removed and archived elsewhere. Campaign records use up a massive volume of available storage capacity as each campaign effectively duplicates the Contact record for storage purposes.

Delete Old Reports

Salesforce makes it easy to create reports frequently leading to a proliferation of reports created by various users. Create folders to house a certain type of report and set clear parameters such as limiting the number of reports in a folder (to 10 or 12) before requiring a new folder be created. Also establish periodic dates to review all reports to identify which ones are obsolete and can be deleted.Legacy reports also present a data security risk as unauthorized users can access fields and information that should be off-limits to them.

Tip # 4: Re-Configure to Reflect Today

Identify Field Owners & Users

We found a common reason for field non-usage was due to it referring non-important information. We also noticed that individuals inside a business would mandate a field be created to collect data – but nobody had been identified as the key user of that field and held accountable for its subsequent data updates.

Identify Object Captains for Input on Changes

Users provide many great ideas for enhancing objects. For example, many departments (other than customer support) may interact with the Case Object and request modifications or provide ideas about new fields to add. While system governance is a collaborative exercise, identifying an Object Captain provides ownership and allocates responsibility for maintaining fields, picklists and even the volume of records historically retained for that object.

Avoid Custom Development Where Possible

Over the last few years, the standard functionality inside Salesforce has evolved tremendously. In addition, there are thousands of custom third-party Apps available for enhanced functionality. Initiate custom development only after you thoroughly determine that standard functionality or an available App will not provide the solution you need.Custom code is always problematic as time evolves; the code creator departs or changes are made to the base Salesforce system that may no longer support the custom code, etc.

Tip # 5: Understand User Behavior

Today's Users are Mobile

The smaller screen space of mobile devices limits the number of fields that are visible without extensive scrolling. Also, mobile users cannot type as they would on a keyboard, and require use of value lists and check boxes to enter data.

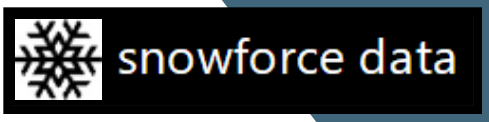
Less is More

Employees have more systems and apps today to interact with than ever before. Condensing and simplifying information helps to organize your user, makes the data collection more concise and provides a training template for their Salesforce use

Think Globally Where Possible

Even small companies conduct business globally today; they may have a distributor or agent channel in other countries. Salesforce Partner, Portal and Community Licenses allow use of your Salesforce system by various third party organizations.

Global users should be considered when fields, objects and other system components are being designed and deployed, even if there are no global users at the current moment.



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