The Salesforce org audit, in 25 checks.

An org that has been live for a year or more carries duplicates, stages nobody agreed, automation from three eras and fields nobody fills in. This checklist walks the org in the order that matters: records first, then stages and forecast, routing, automation, and last the fields, access and reports. Some features named here depend on your Salesforce edition and licenses.

1
Work in the org
Tick a check only when you can open the rule, report or setup page that proves it.

2
Write down each miss
Every unticked check is a finding. Page 3 has a table for them.

3
Rank before you fix
Order the findings by their effect on the numbers leadership uses.

PART 1 OF 5

Records: what everything else is built on

Scores, routing and forecasts all read these records. If they are wrong, everything built on them is wrong with confidence.

- [ ] 01 **Duplicate rules and matching rules** are active for leads, contacts and accounts, and you know roughly how many duplicates already exist.
- [ ] 02 Every contact sits on an account, and a new lead from a company you already know is **matched to that account** before a rep works it.
- [ ] 03 Every account and open opportunity has an active owner. **Nothing belongs to an inactive user**.
- [ ] 04 **Lead Source** is a fixed picklist, filled in on new leads, and it survives conversion.
- [ ] 05 Lead conversion maps the fields you rely on to the contact, account and opportunity, so **nothing useful is lost** when a lead converts.

PART 2 OF 5

Stages and forecast: do they match what happened

Stages that can be entered without evidence make the forecast optimistic.

- [ ] 06 Each opportunity stage has written entry rules, and **validation rules or required fields** enforce the evidence.
- [ ] 07 Each stage maps to the **forecast category and probability** you actually mean.
- [ ] 08 Closed lost opportunities carry a **loss reason from a picklist**, not free text.
- [ ] 09 Open opportunities with **a close date in the past** are re-dated or closed on a schedule.
- [ ] 10 **Lead Status** has a short list of values with written meanings, and old open leads are reviewed.

PART 3 OF 5

Routing and response: who gets the lead, and when

A lead sitting in a queue that nobody watches is revenue waiting.

- [ ] 11 Every new lead gets an owner through assignment rules or a flow, and you know how many sit in **a queue with no person**.
- [ ] 12 You can report how long a new lead waits **for an owner and for a first activity**.
- [ ] 13 Assignment covers territories, time off and **reps who have left**.
- [ ] 14 Reps log calls and emails in Salesforce, so **Last Activity** means something.
- [ ] 15 Leads from every source, including forms and integrations, **go through the same routing**.

PART 4 OF 5

Automation: what is still running

Most orgs carry automation from several eras, and two of them updating the same field will overwrite each other without an error.

- [ ] 16 Every active flow is listed: **what starts it, what it changes, who owns it**.
- [ ] 17 Automation still running in Workflow Rules or Process Builder is listed, with **a plan to move it to Flow**.
- [ ] 18 No two automations **update the same field** on the same object.
- [ ] 19 Every integration and installed package that writes to Salesforce is listed with **the fields it writes**.
- [ ] 20 Changes are built and tested in **a sandbox**, where your edition includes one, before they reach production.

PART 5 OF 5

Fields, access and reports

Fields that are empty on most records, and the reports built on them, are the clearest candidates for cleanup.

- [ ] 21 Custom fields that are **empty on nearly every record** are retired, or have an owner who fills them.
- [ ] 22 Fields that rules depend on are **picklists with fixed values**.
- [ ] 23 You know which dashboards leadership opens, and **each number traces to a field and a report filter**.
- [ ] 24 Reps can see and edit what they need and no more, and you know **who holds admin rights**.
- [ ] 25 **One named person** owns the org: fields, permissions and changes.

Your findings, ranked before you fix.

Write each unticked check here, put a cost beside it in your own terms (deals, hours, forecast error or license cost), and give it an owner. Fix in the order below, not in the order you found them.

#	FINDING (UNTICKED CHECK)	WHAT IT COSTS	OWNER	FIX	BY WHEN
1					
2					
3					
4					
5					
6					

WHAT TO FIX FIRST

The order we work in

1. **Part 1.** Records first. Merging and reassigning changes every count that follows.
2. **Part 2.** Then stages and forecast, so the pipeline means one thing.
3. **Parts 3 and 4.** Routing and automation next, once the records they act on are clean.
4. **Part 5.** Fields, access and reports last, when you know what is actually used.

This order is our working practice, not an industry benchmark.

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How to set up lead scoring in Salesforce

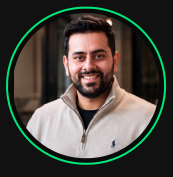
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