The Healthy Org Workbook

Activities to monitor, tune up, and schedule your org's maintenance to keep it running smoothly

Contents

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Introduction

The importance of good habits to keep your org running smoothly.

Everyday, admins use Salesforce to create customized solutions to solve business challenges and deliver real business value. Whether you're new to Salesforce or an experienced admin, we can all use a little help learning good habits to monitor, tune up, and schedule your org's maintenance to keep it running smoothly.

In these pages, you'll find guidance and activities to keep your org healthy to drive impact! After each section, you'll have the opportunity to take your new knowledge for a spin with hands-on activities and planning resources.

This workbook is a complimentary resource to Salesforce.org Events and Webinars, Resource Center, and Salesforce Help.

Premier Success Plan customers are invited to explore the Premier Toolkit for more resources, including the Premier Training Catalog and role-based learning paths.

Let's dive in.

Data Security

Salesforce takes data security seriously. Not only do we take every precaution to safeguard your data, but we ask you to be our partner in building and maintaining that security as well.

As an Admin, you are responsible for thinking about the security of your Salesforce org. This means making sure your users have the right level of access to the system and following best practices around security. Make sure you are coordinating with your IT Team, if you have one. That's critical to setting the right policies for Salesforce access.

How Data Security Breaches Happen

- Phishing
- Malware
- Social Engineering
- Credential stuffing
- Lost or stolen electronic devices

Phishing is a cybercrime in which the attacker uses a spoofed email address as bait to lure individuals into providing sensitive data, personally identifiable information, banking, credit card details, and passwords.

You can't always prevent, but you can always prepare and practice cyber hygiene to effectively mitigate cyber attacks.

All the technical controls in the world won't' be enough to protect data if users don't understand policies and procedures, how to use tools, and what to do in case of a breach.

3 Key Principles to Keep Your Data Safe

1 Defense in Depth

Layered security mechanisms, like firewalls and multi-factor authentication, increase your data security

2 Principle of Least Privilege

When evaluating user permissions, provide users with the minimum amount of access needed to do their job, and no additional privileges.

3 Empowered Users

Phishing is the most common form of data breach, which means users are the most primary target. Educate your users on risks and share solutions.

Avoid Common Pitfalls That Impact Org Security

- Assign each user their own login
- Assign users appropriate profiles
- Deactivate users that have left the organization
- Align permissions to changes in the organization on a regular basis

How Multi-Factor Authentication (MFA) Works

MFA requires a user to validate their identity with two or more secure forms of evidence - or factors - when they log in. One factor is something the user knows, such as their username and password combination. Other factors are verification methods that the user has in their possession such as a security key or authentication app. While there's a risk that a password may be compromised, it's highly unlikely that a bad actor can also gain access to a stron verification method like a security key or authentication app.

Learn More: How to enable Multi-Factor Authentication

Effective February 1, 2022, Salesforce customers are contractually required to use MFA to access Salesforce products. All internal users who log in to Salesforce products (including partner solutions) through the user interface must use MFA for every login.

Cybersecurity is more important than ever

$6T
Estimated cost of cybercrime by 2021[1]

67%
Increase in cybercrime over the last five years[2]

3.5X
Annual growth of ransomware attacks[3]

When users are aware and care about security, they work to promote strong cybersecurity practices around them. This human element of cyber security is particularly crucial to securing data, since attackers often target users in an organization's security chain.

All the technical controls in the world-intrusion detection systems, firewalls, data loss prevention, and so on-won't be enough to protect data if users don't understand policies and procedures, how to use tools, and what to do in case of a breach.

No single person is responsible for data security. It's a shared responsibility of the whole organization to ensure the privacy and accuracy of information. To build a culture of security awareness, so users understand the importance of data security, current risks, and share solutions.

References

1. Cyber Security Ventures article: Cybercrime Damages $6 Trillion By 2021
2. Accenture Security, 2019 The Cost of Cybercrime study (PDF): Accenture 2019 Cost of Cybercrime Study
3. Cisco Cybersecurity Report Series

Let's Practice!

Run Security Health Check with Every Release

Why this is important

Ever wish you had a dashboard to assess your security settings? We have good news - you do! It's called Health Check, and it's available in Setup. As an admin, you can use Health Check to improve your org's overall security and even improve your score with one click.

A baseline score shows how "healthy' your org's security is, on a scale from 0-100 (100 being the most secure). The score is calculated by measuring how closely your org's security settings align with Salesforce's recommended settings. Below the baseline score, security settings are broken down into High, Medium, and Low risk. You'll see which areas your org is out of compliance. To remediate a risk, edit the setting or use Fix Risks button to change settings.

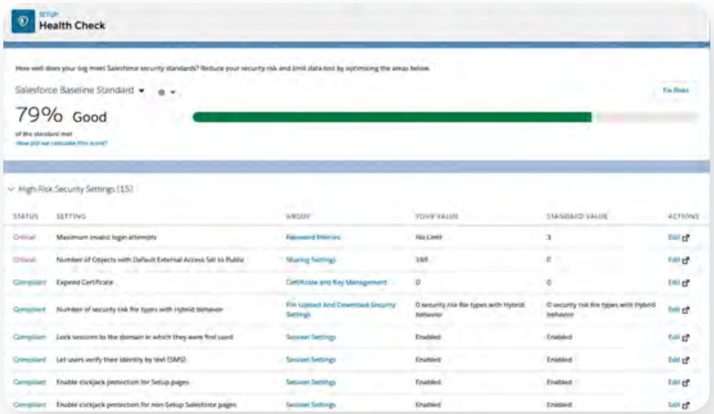
Identify security risks in your org

Step 1:
Log into your Salesforce org

Step 2:
Go to the Setup page

Step 3:
In the **Quick Find** box, type **Health Check**

Step 4:
Select **Health Check**



Learn more: Security Health Checks

Fix potential vulnerabilities

As an Admin, you can use Health Check to fix risks in your security settings, all from a single page. You can also click the Fix Risks button in Health Check to change all settings to the recommended values at once!

Be aware that changing all of these settings at once may affect something unintended like an integration or accidentally remove access from some users - so when adjusting user visibility and access, we recommend testing changes in your sandbox first. It's best to go through these one at a time.

Document your findings

Documentation is incredibly powerful in keeping your org maintained, prioritize your workload, and help you succeed. Too often, Admins struggle with finding time, limited resources, or are not sure what to document.

After running Health Check, we recommend starting a Google Doc or MS Word document to track your security setting changes somewhere it can be easily accessed and shared.

Let's Practice!

Evaluate Permissions with Every Release

Why this is important

Over time, it's easy to end up with too many profiles and permission sets. As your user's roles and needs change, some are no longer relevant. In this activity, we'll help you explore ways you can evaluate permissions, improving your org health.

Following the Principle of Least Privilege, give users the lowest level of user rights (access to read/write data) that they need to do their job. Salesforce helps you implement this with profiles, permission sets, and permission set groups so that you can easily customize the access given to users. Learn more about Salesforce Data Security >

Profiles and Permissions

Profile Name	Object, Field, etc.	Permission	Needs Update?	Notes
Ex. Volunteer Coordinator	*Contacts*	*Create, Read, Edit*	*No*	
	Opportunities	*Read*	*Yes*	*Update to include Create and Edit access*
	Users	*Read, Edit*	*Yes*	*Update to remove Edit access*

After documenting every permission contained in a profile or permission set, we recommend building a committee of power users, executive sponsor, and admin(s) to evaluate updates needed with every release. Below are a few examples of clean up activities for your committee to consider:

- Update to include or remove create, edit or delete access
- Delete unused profiles and permission sets
- Organize remaining profiles with proper naming conventions
- Combine similar profiles and convert profiles to permission sets

Data Quality

What is “Bad” Data?

If you have a significant amount of data, chances are you have come across problems with data quality. You’re not alone. Before you can fix your data, let’s think through what it actually means for your data to be “bad.”

• Incomplete Records	Does data correctly describe the “real world’ object or event?
• Missing Records	Are all data points captured across all records?
• No Data Standards	Are all data points captured in the same way across all records?
• Stale Data	Is your data time-sensitive? Does it need to be archived?
• Duplicate Records	Are all records unique (no duplicates)?
• Validity	Does data conform to the syntax (format, type, range) of its definition?

The Cost of Bad Data

Whether you realize it or not, data underpins everything you do. Data decides where your organization puts its money, it dictates the emails you send as well as when and how you send then, it informs your conversations with stakeholders, and drives what needs to be done next.

If your data is inaccurate or incomplete, all of that is compromised.

THe more data you have, the more difficult it gets to keep it clean. To minimize data inaccuracies, make a clear plan, document it, and make sure that all of your users have access and ownership of that document. Remember, this plan will evolve as your organization’s priorities and milestones change, so it’s important to keep updating it.

If this sounds overwhelming, don’t worry. Salesforce tools can help. Fortunately, it’s never too late to improve your data quality.

Prioritizing Your Data Cleanup

It’s time to make data hygiene a priority in your day-to-day workflow. If you have a mature database, cleaning it up may not be a quick task. How do you decide where to start?

As a general rule, prioritize:

1. Highly visible, frequently viewed
2. Duplicate records
3. Business-specific information
4. Unnecessary, unused fields

Salesforce Data Maintenance Tools

Validation Rules

Verify that the date a user enters in a record meets the standards you specify before the user can save the record.

Watch Video: Optimize Your Org Health with Validation Rules

Default Values

Define a default value for a field (ex: Donor type field can be set to a default value of Contact).

Learn More: Define Default Field Values

Roll-up Summary Fields

Calculates values from related records, such as those in a related list.

Learn More: Roll-Up Summary Field

Page Layouts

Create unique layouts for different user profiles to ensure they have the best setup to do their job.

Learn More: Page Layouts

Help Text

Guide users along with help text that explains what kind of data needs to be entered and the proper formatting ensure they have the best setup to do their job.

Learn More: Field-Level Help

Formulas

Display data from other records or calculate values to prevent users from making mistakes or having to re-enter data multiple times.

Learn More: Choose a Formula Data Type

Let's Practice!

Define Your Goals and Metrics

Why this is important

Set the destination for your healthy org by clearly understanding the goals and provide a way to measure and prove results. Set the priority to help focus your maintenance efforts going forward. Think through the ways in which you would measure the achievement of these goals.

Ask question such as: What are 2-3 main goals I can identify for my org? Are some goals more important than others? What business priorities are addressed in my goals? How can I measure my org priorities in Salesforce? What is the metric(s) that provides me with insight for each of my priorities? How will I get this data and in what frequency?

My Business Goals

Goal	Metric	Data Format
Ex. Event Registration	*Number of registrants*	*Number Field*
Ex. Interest in future events	*Event type*	*Picklist*

Let's Practice!

Profile Your Data

Why this is important

Now that we know more about the kind of data you hope to gather, stay ahead of bad data by tracking where the data may be coming from and consider potential pain points.

My Data Entry Points

Data Entry Point	Notes
Ex. Manual data entry	*User error, lack of training, user data breach*
Ex. Third-party integration	*Duplicate data, API errors, different data formats*

Let's Practice!

Create a Data Hygiene Schedule

Why this is important

Cleaning up your data once won't do any good if you don't have a data hygiene plan going forward. Use this chart as a way to stay on track. Think about your goals and review the data profile that you've already created to prioritize actions. It's time to make data hygiene a priority in your day-to-day workflow.

My Data Hygiene Schedule

Action	Frequency	Reviews
Ex. Review all records created last week	*Weekly*	*Admin and Staff*
Ex. Setup data backup and export	*Monthly*	*Admin*

Let's Practice!

Build an Exception Report

Why this is important

Exception reporting is a technique designed to help you trust your data by exposing what's missing or where there might be contradictory information.

For example, you can build a report that exposes any contact that do not have an email address populated. Let's walk through building this sample report.

Technique to clean your data

Step 1: Build exception reports using cross filters to find missing or contradictory information

Step 2: Build a report folder called, "Exception Reports" to easily find and run reports

Step 3: Subscribe to your most important exception reports

REPORT: CONTACTS & ACCOUNTS

Contacts without Email Addresses

Total Records

85

	First Name	Last Name	Account Name	Email
1	Martha	Washington	Martha Washington Administrative Account	-
2	Stacy	Cooper	Bruce Diaz Administrative Account	-
3	Tim	Barnes	Steve Bowman Administrative Account	-
4	Herbert	West	Herbert West Administrative Account	-
5	Janet	Cooper	Henry Cooper Administrative Account	-
6	Janet-Marie	Jackson	Janet-Marie Jackson Administrative Account	-
7	Bruce	Webb	Webb Administrative Account	-
8	Stacy	Cooper	Stacy Cooper Administrative Account	-

Streamline Your Org

Now that your data is clean and secure, let's think about organizing your Salesforce instance with the end user in mind. Even if your data is perfect, your org won't get much use if it is not laid out in a way that makes sense to users. Streamlining your org can be boiled down to two concepts - making it easier to enter information and then making it easier to find it.

Make it Easy to Enter Data

Your users are likely entering a lot of data into Salesforce, so it's important to make the process simple and intuitive for them. Consider the following:.

Page Layouts

Did you know that you can create a different page layout for each of your user profiles? That means that each user will see only the fields and information that is relevant to them.

Help Text

If you want to guide your users along in entering information in a specific way, consider utilizing help text. Use this feature in cases where questions might arise-for example, since there are different ways of entering dates, you may include help text to let your users know the preferred way for your organization. If this appeals to you, you may also be interested in in-app guidance!

Required Fields

Let your users know what's important by making certain fields required. But, take care! While it may be tempting to mark every field as required, too many required fields will make it time-consuming and potentially difficult for users to enter data. Or worse, users enter bad data just so they can save a record

Make it Easy to Find Data

Aside from entering data, your users are likely spending a good amount of their day trying to find information. But there are ways you can help!.

List Views

Organize data into list views for easier navigation and improved actionability. List views exist on every object and can either be public or private.

Customized Search Results

Make search results easier to sift through by customizing which fields should be included. You can also customize which buttons display in custom list views and search results.

Record Types

If you have multiple departments operating with different processes, record types may be a good option for your org. Each record type allows you to have a pre-set page layout with specific fields, processes, and help text.

Compact Layouts

Compact layouts allow you to group the most important data at the top, for quick and easy viewing.

Let's Practice!

Talk to Your End Users

Why this is important

You can glean a lot from data, but sometimes the best insight you can get is from your users. Ask some of your end users the questions below to learn more about how you can streamline and optimize your org.

- What is your main goal with Salesforce?
- When do you find Salesforce most useful?
- What is your biggest pain point with Salesforce?
- What else would you find helpful in Salesforce?

Understand Your Business Units or Departments

Why this is important

If you have multiple business units or departments and are considering using record types, start by mapping out each department's data needs and processes for planning purposes.

My Business Units or Departments

Business Unit	Record Type	Vital Information	Stages
Ex. Fundraising	*Major Gifts*	*Capacity to Give, Propensity to Give, Philanthropic Interest*	*Identify, Qualify, Solicitation, Cultivation, Negotiation, Received*
	Gift In-Kind	*Marked Value, Gift Type, Gift Description*	*Promised, Received, Not Received*

Let’s Practice!

Run Salesforce Optimizer

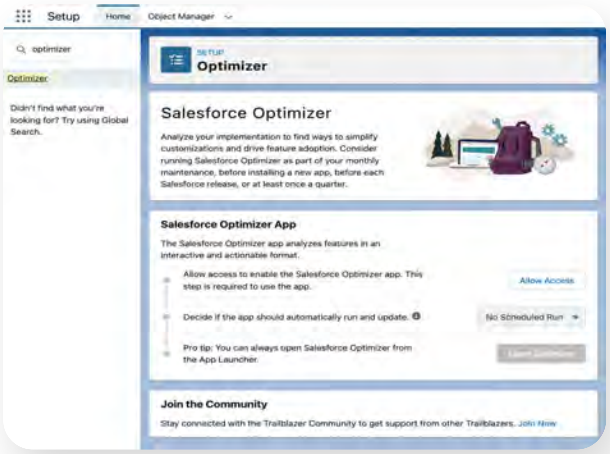
Why this is important

Salesforce Optimizer is a maintenance productivity app for Salesforce Amins which provides prioritized insights coupled with recommendations and best practices.

The Optimizer will check your org against established best practices and let you know where you are doing well and where improvements can be made. Your evaluation may be long-at times it can be over 100 pages-however, it’s organized into digestible sections, so you can take it at your own pace.

Consider running Salesforce Optimizer as part of your scheduled maintenance, before installing a new app, before each Salesforce release, or at least once a quarter. You can run the report as often as you want to keep on top of maintenance activities. You can set the Optimizer app to run automatically on a quarterly basis. **Watch demo video > Remove Security Risks from Your Org with a User Audit**

Run a scan and remove security risks



Step 1: Log into your Salesforce org

Step 2: From **Setup,** navigate to the Quick Find Box and enter **Optimizer**

Step 3: Select **Optimizer**

Step 4: Select **Allow Access** to authorize Optimizer to analyze your org

Step 5: Check the **attestation checkbox**

Step 6: Click **Save and Close**

Step 7: Click **Open Optimizer**

Step 8: Click **Run Optimizer**

Automate Your Org

You've cleaned and streamlined, now the real fun begins. One of the most important benefits of salesforce is the ability to automate your work. You do so much in the course of a day, let Salesforce take some things off your plate.

When to Automate

How do you decide which processes to automate and what should be done manually? Here are three key things to consider:

Repetitive Tasks: Anything you do on a regular basis is a candidate for automation

Clear Logic / Parameters: If those repetitive tasks also have repetitive rules that always apply, that is yet another indicator that they can be automated.

Applicable to Multiple Users: While this is not technically required, if a repetitive process with clearly defined rules applies to multiple users, it's especially important to consider automation. Think of all the time you can save with just a few clicks!

How to Automate

The best way for you to maintain and future-proof your org is to move your automation to Flow. That can be a large, daunting task for those of you who have become Process Builder rockstars or are looking at a giant pile of Workflow Rules that nobody has touched in 3 years. We know this will take time.

Pro-Tip: In some cases, rather than migrate your workflow rules and processes as is, it may be beneficial to take the time to review them, especially automation that was built a while ago. Evaluate whether or not they're needed or can be improved.

Go with the Flow

Stay up to date with what's happening with Workflow Rules and Process Builder. Here are Flow FAQs on this topic and available resources including:

- Automate Your Business Processes
- Migration Tool (Summer '22)
- Flow Trigger Explorer (Spring '22)

There's never a better time to learn than right now. Watch the Flow Builder video to learn about what flow can do, and the three types of flows and when to use them.

Let's Practice!

Process Mapping

Why This Is Important

Process mapping creates visual representations of business processes. Not only will this exercise clarify what can be automated, it will also allow you to spot pain points and create room for improvement.

Before you start mapping your business processes, try mapping something outside of work to practice. After all, we're surrounded by processes: making breakfast, mailing a birthday card, and planning a community fundraiser are all processes. And remember to start small. Don't try to map out an organization's core process first. Pick something lower risk, like the onboarding process, to start with.

Learn more > Create a Business Process Map

Map your processes

Step 1: Identify the process you need to map

Step 2: Create a winning team

Step 3: Gather all necessary information

Step 4: Develop a process map

Step 5: Analyze the process map

Step 6: Streamline steps

Step 7: Manage the process

Watch Video: Business Process Mapping for Salesforce Admins

Let's Practice!

Run Migrate to Flow Tool

Why This Is Important

We know it's a lot to process, but it's time to begin the transition to using Flow Builder, the future of low-code automation. The Migrate to Flow tool now supports more kinds of workflow rules, including most rule criteria formulas. Use the Migrate to Flow tool to convert your workflow rules into flows. Flow Builder can do everything that workflow rules can do–and more. Learn more > Flow and Process Management

Convert Workflow Rules to Flows with Migrate to Flow Tool (Generally Available)

Step 1:

Log into your Salesforce org

Step 2:

From **Setup**, navigate to the Quick Find box and enter **Migrate to Flow**

Step 3:

Select **Migrate your workflow rules to flows**

Step 4:

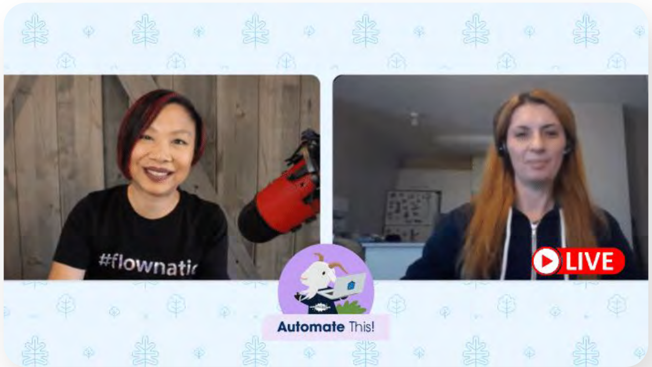
Select a workflow rule and click Migrate to Flow

Step 5:

Test your resulting flow in Flow Builder

Step 6:

Deactivate the workflow rule that you converted and activate the new flow



Watch Video: Automate This! - Migrate Workflow Rules and Processes to Flow

Pro Tip: Subscribe to the Live Stream Automate This! series on the Salesforce Admin YouTube Channel.

Additional Resources

Data Security

Salesforce Trust Site
Salesforce Trust Site: Security for Administrators
Salesforce Security Guide (version 55.0, Summer '22)
Salesforce Blog: Is Your Remote Work Environment Secure?
Trailhead: Protect Your Data Security
Trailhead: Shield Platform Encryption
Trailhead: Enhanced Transaction Security
Trailhead: Get the Scoop on Security
Trailhead: Use Health Check to Scan Your Security Configurations
Trailhead: Get the Scoop on Security
Trailhead: Multi-Factor User Authentication
Trailhead: European Union Privacy Law Basics
Knowledge Article: Security Health Check
Knowledge Article: View and Manage Users
Video 10 Easy Steps to Mastering Org Security
GDPR Resource Site
GDPR Data Processing Addendum

Data Quality

Trailhead: Delve into Data Management
Trailhead: Data Quality
Trailhead: Duplicate Management
Knowledge Article: Required Fields
Knowledge Article: Validation Rules
Knowledge Article: Field Update Actions
Knowledge Article: Manage Duplicate Records
AppExchange (FREE): Data Quality Analysis Dashboard
AppExchange (FREE): Data.com Assessment App
Blog Article: Exception Reporting - An Admin's Best Friend
eBook: Introduction to Data Governance and Stewardship

Additional Resources

Streamline Your Org

Trailhead: Salesforce Optimizer
Video Series: Essential Habits for Salesforce Admins 4-Part Series
Resource: What is Process Mapping?
Blog: Introduction to Universal Process Notation (UPN) for Salesforce Process Mapping
Knowledge Article: Run the Salesforce Optimizer App
Knowledge Article: Dependent Picklist Values
Knowledge Article: Formula Fields
Knowledge Article: Lookup Field Filters

Automate Your Org

Automate This! Live stream series on Salesforce Admins YouTube
Hands-on Training: Automate with Flow
Blog Article: The Complete Guide to Salesforce Flow
Trailhead: Process Automation
Trailhead: Quick Start with Process Builder
Knowledge Article: Workflow Considerations
Knowledge Article: Process Limits & Considerations
Knowledge Article: Limits & Considerations with Flow

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Thank You