

Salesforce Assessment List

- Meet with departments to discuss issues and wish list items
- Page Layouts that are optimized
- Validation Rules (Do they still make sense)
- Automations (Do they still make sense)
- Profiles and if there are too many System Administrators
- Privacy Model
- Have they taken advantage of all of the enhancements Salesforce has provided over the last couple of years (MyLabels, conditional visibility on fields, Dynamic layouts, etc)
- Are they using Einstein Activity Capture properly
- Are they using State/Country picklist fields
- Do they have any Legacy APIs that are not longer supported
- Expired and No longer needed Installed Packages
- Release Updates



PARTNER
SINCE 2019

<https://myonlineadmin.com/>

