



Salesforce Org Health Review

Sample Clinic

Sample org (sandbox, replayed data)

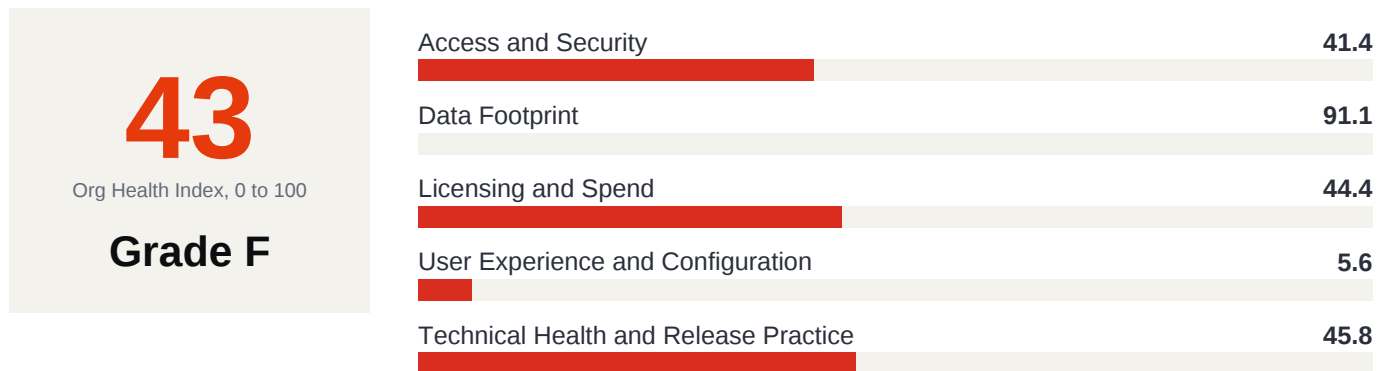
Org Id	00D0000000000SAMPL	Org type	sandbox
Review date	September 8, 2026	Reference	RUN-2026-0001
Scoring model	v1.0	Indicators	44 across five areas

43

Org Health Index, 0 to 100

Grade F

How healthy is the org?



We measured 44 indicators of the Sample Clinic Salesforce org across five areas and scored each one against the healthy range described in the scoring appendix. 33 indicators sit outside their healthy range. The areas that need attention first are Licensing and Spend (44.4), Access and Security (41.4), Technical Health and Release Practice (45.8), User Experience and Configuration (5.6).

Where to start

Actions are ordered by the weight the scoring model gives the indicator. Every number in this review was read from the org's own APIs and Setup pages on September 8, 2026; nothing in the org was changed.

Action	Area	Owner	Effort	When
Org-wide Apex test coverage. Raise coverage on the classes that change most often first, and add assertions to tests that only exercise code.	Technical Health and Release Practice	Developer	Medium	Days 31 to 60
Custom fields on Opportunity. Reduce the Opportunity layout to the fields sales actually uses with Dynamic Forms, and retire or hide the rest based on population data.	User Experience and Configuration	Salesforce Admin	Medium	Days 31 to 60
Profiles with View All or Modify All on sensitive objects. Remove View All and Modify All from non-administrator profiles, move the genuine needs into narrowly scoped permission sets, and validate with the client which objects hold sensitive data.	Access and Security	Security Lead	Medium	First 30 days
Custom fields on Account. Group fields by team with Dynamic Forms visibility rules and retire fields with no population.	User Experience and Configuration	Salesforce Admin	Medium	Days 31 to 60
Workflow rules. Migrate workflow rules to Flow and delete them after a parallel-run period.	Technical Health and Release Practice	Developer	Medium	First 30 days

Custom fields on Lead. Retire unused Lead fields and simplify the lead conversion mapping.	User Experience and Configuration	Salesforce Admin	Medium	Days 31 to 60
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Scorecard

Each indicator is shown with the observed value, the healthy range the scoring model uses, and the goal we recommend. Status is the scoring band the observed value falls in.

Access and Security score 41.4 of 100, 7 indicators

Indicator	Observed	Healthy range	Goal	Status
Security Health Check score	80% of the Salesforce baseline	90% or higher	90%+	WATCH
High-risk security settings	11 high-risk settings	0 high-risk settings	0	ACT
Profiles with View All or Modify All on sensitive objects	20 of 54 profiles (37.0%)	below 10% of profiles	below 5%	ACT
Profiles granting Modify All Data	4 of 54 profiles	1 to 2 administrator profiles	2 or fewer	WATCH
Permission sets granting Modify All Data	4 permission sets	2 or fewer	2 or fewer	WATCH
Integration users without View All Data or Modify All Data	6 of 8 integration users (75.0%)	90% or higher	90%+	WATCH
Active users with no login in 90 days	0 of 1388 active users (0.0%)	below 5%	below 5%	HEALTHY

Data Footprint score 91.1 of 100, 5 indicators

Indicator	Observed	Healthy range	Goal	Status
Largest object's share of data storage	Schedules holds 56% of used data storage (31.5 MB, 16,115 records)	no single object above 40% of used data storage	below 40%	WATCH
Data storage used	55 MB of 200 MB (27.5%)	70 to 80% of allocation	70%	HEALTHY
File storage used	0 MB of 200 MB (0.0%)	70 to 80% of allocation	70%	HEALTHY
Legacy Attachments as a share of used file storage	0 attachments, 0.0 MB (0.0% of used file storage)	below 5%	below 5%	HEALTHY

Closed tasks older than two years	0 of 0 tasks (0.0%)	below 20%, subject to the retention policy	below 20%	HEALTHY
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Licensing and Spend score 44.4 of 100, 5 indicators

Indicator	Observed	Healthy range	Goal	Status
Salesforce (full CRM) license utilization	1381 of 1397 Salesforce licenses in use (98.9%)	85 to 90%	85 to 90%	HEALTHY
Paid user license types, utilization	1381 of 21565 licenses in use (6.4%)	80 to 90%	80%+	ACT
Unused paid user licenses	20184 unused licenses	fewer than 50 unused seats	fewer than 50	ACT
Permission set license utilization	1062 of 227618 permission set licenses assigned (0.5%)	80% or higher	80%+	ACT
Unused managed package seats	0 of 0 package seats in use	fewer than 10 unused seats	fewer than 10	HEALTHY

User Experience and Configuration score 5.6 of 100, 11 indicators

Indicator	Observed	Healthy range	Goal	Status
Custom fields in the org	46982 custom fields	under 5,000 for a single-cloud org	trend down each quarter	ACT
Custom fields on Opportunity	816 custom fields	50 to 100 custom fields on a core object	100	ACT
Custom fields on Account	843 custom fields	50 to 100 custom fields on a core object	100	ACT
Custom fields on Lead	870 custom fields	50 to 100 custom fields on a core object	100	ACT
Custom fields on Contact	505 custom fields	50 to 100 custom fields on a core object	100	ACT
Custom fields on Case	244 custom fields	50 to 100 custom fields on a core object	100	WATCH

Custom objects	1529 custom objects	under 200 for a single-cloud org	trend down	ACT
Most page layouts on one object	61 layouts on Customer_Onboarding	5 or fewer layouts per object	5 or fewer	ACT
Lightning record pages	337 record pages	under 100	trend down	ACT
Active record types	153 active record types	under 50	trend down	ACT
Profiles	54 profiles	under 15, with permission sets carrying the differences	under 15	ACT

Technical Health and Release Practice score 45.8 of 100, 16 indicators

Indicator	Observed	Healthy range	Goal	Status
Outbound change sets	0 outbound change sets	few or none; deployments through version control	none in use	HEALTHY
Inbound change sets	0 inbound change sets	few or none; deployments through version control	none in use	HEALTHY
Active flows (unmanaged)	365 active flows	under 100 for a single-cloud org, scaling with size	trend down through consolidation	ACT
Inactive flows as a share of all flows	15 of 380 flows inactive (3.9%)	below 10%	below 10%	HEALTHY
Active record-triggered flows	131 record-triggered flows	one before-save and one after-save flow per object	trend down through consolidation	ACT
Active Process Builder processes	2 active processes (retired technology)	0	0	WATCH
Workflow rules	22 workflow rules (retired technology)	0	0	ACT
Apex classes (unmanaged)	1953 Apex classes	under 300 for a single-cloud org	trend down	ACT

Apex triggers (unmanaged)	36 Apex triggers	one trigger per object	one per object	WATCH
Org-wide Apex test coverage	74% covered (last test run)	85% or higher (75% is the deployment minimum)	85%+ with meaningful assertions	ACT
Apex classes on API version below 45	3 classes below API 45.0	0	0	WATCH
Active validation rules	593 active validation rules	under 150 for a single-cloud org	trend down	ACT
Most validation rules on one object	64 active rules on Opportunity	under 20 per object	under 20	ACT
Metadata deployments in the last 365 days	6 deployments	at least twice a month	twice a month or more	WATCH
Deployments made with change sets	0 of 6 deployments via change sets (0.0%)	25 to 35% or lower, with the majority through DevOps tooling	below 25%	HEALTHY
Installed packages	78 installed packages	under 30	trend down	ACT

Access and Security score 41.4

What we found

1. Security Health Check score [Medium]

The org's Security Health Check score is 80% of the Salesforce baseline, against Salesforce's own baseline where 90% or higher is rated Excellent.

Why it matters: Each high-risk setting is a documented gap against Salesforce's baseline and a likely audit finding.

How sure we are: Measured from the org's API data at run time (source: Tooling API: SELECT Score FROM SecurityHealthCheck). Benchmark: 90% or higher (Salesforce Help: How Is the Health Check Score Calculated (90+ Excellent, 80-89 Very Good, 70-79 Good, 55-69 Poor)). Confirm business context with the org owner before acting.

2. Profiles with View All or Modify All on sensitive objects [High]

20 of 54 profiles (37.0%) grant View All Records or Modify All Records on the sensitive objects in scope, against a benchmark of below 10% of profiles.

Why it matters: Users on these profiles can read or edit every sensitive record regardless of sharing rules, which undermines least-privilege access and, in regulated industries, compliance obligations.

How sure we are: Measured from the org's API data at run time (source: ObjectPermissions on ('Contact','Lead','Account') with PermissionsModifyAllRecords or PermissionsViewAllRecords, profile-owned).

Benchmark: below 10% of profiles (Salesforce Security Implementation Guide: View All and Modify All are intended for administrators; consultancy target). Confirm business context with the org owner before acting.

3. High-risk security settings [High]

11 high-risk settings deviate from the Salesforce Baseline Standard.

Why it matters: High-risk settings such as disabled MFA or public external access widen the attack surface and are the first items an auditor will ask about.

How sure we are: Measured from the org's API data at run time (source: Tooling API: SecurityHealthCheckRisks WHERE RiskType = 'HIGH_RISK'). Benchmark: 0 high-risk settings (Salesforce Baseline Standard (Health Check)). Confirm business context with the org owner before acting.

4. Integration users without View All Data or Modify All Data [Medium]

6 of 8 integration users (75.0%) run without View All Data or Modify All Data.

Why it matters: An integration credential with org-wide data access can exfiltrate or corrupt every record if the connected system is breached.

How sure we are: Measured from the org's API data at run time (source: Active users on the Salesforce Integration license or an Integration/API profile; compliant = profile lacks ModifyAllData and ViewAllData). Benchmark: 90% or higher (Salesforce best practice: one dedicated API-only user per integration on the Salesforce Integration license). Confirm business context with the org owner before acting.

5. Profiles granting Modify All Data [Medium]

4 of 54 profiles grant Modify All Data, the broadest data permission in the platform.

Why it matters: Modify All Data bypasses every sharing rule and field restriction, so each extra profile multiplies the blast radius of a compromised or careless account.

How sure we are: Measured from the org's API data at run time (source: PermissionSet WHERE IsOwnedByProfile = true AND PermissionsModifyAllData = true). Benchmark: 1 to 2 administrator profiles (Consultancy target based on Salesforce least-privilege guidance). Confirm business context with the org owner before acting.

6. Permission sets granting Modify All Data [Medium]

4 permission sets grant Modify All Data.

Why it matters: Permission sets with Modify All Data are easy to assign and hard to notice, so they tend to spread beyond the original intent.

How sure we are: Measured from the org's API data at run time (source: PermissionSet WHERE IsOwnedByProfile = false AND PermissionsModifyAllData = true). Benchmark: 2 or fewer (Consultancy target). Confirm business context with the org owner before acting.

Recommended actions

Action	Owner	Effort	When
Security Health Check score. Work through the high-risk settings in the Health Check page first (session settings, MFA, login IP ranges), then the medium-risk items, and re-run Health Check after each change.	Security Lead	Medium	First 30 days
Profiles with View All or Modify All on sensitive objects. Remove View All and Modify All from non-administrator profiles, move the genuine needs into narrowly scoped permission sets, and validate with the client which objects hold sensitive data.	Security Lead	Medium	First 30 days
High-risk security settings. Fix each high-risk setting or document an accepted exception; export the Health Check risk list as the tracking artifact.	Salesforce Admin	Low	First 30 days
Integration users without View All Data or Modify All Data. Move integrations to dedicated API-only users on the free Salesforce Integration license, scope their permission sets to the objects they touch, and restrict them by IP range.	Developer	Medium	First 30 days
Profiles granting Modify All Data. Restrict Modify All Data to the system administrator profile and grant temporary elevated access through permission sets with expiry.	Salesforce Admin	Low	First 30 days
Permission sets granting Modify All Data. Review every assignment of these permission sets, remove stale ones, and add expiry dates to the rest.	Salesforce Admin	Low	First 30 days

Data Footprint score 91.1

What we found

1. Largest object's share of data storage [Medium]

The largest object holds Schedules holds 56% of used data storage (31.5 MB, 16,115 records).

Why it matters: One runaway object (typically activities, history, or an integration log) dominates storage growth and drives the next storage purchase on its own.

How sure we are: Measured from the org's API data at run time (source: Setup > Storage Usage page, Current Data Storage Usage table, read with the review session). Benchmark: no single object above 40% of used data storage (Consultancy target; Setup > Storage Usage). Confirm business context with the org owner before acting.

Recommended actions

Action	Owner	Effort	When
Largest object's share of data storage. Set a retention policy for the dominant object, archive records past it to external storage, and add a scheduled purge so the share stops growing.	Salesforce Admin	Medium	First 30 days

Licensing and Spend score 44.4

What we found

1. Paid user license types, utilization [High]

1381 of 21565 licenses in use (6.4%) across paid user license types (free and integration license types excluded).

Why it matters: Low utilization across license types usually points to shelfware bought for a project that never scaled, which keeps renewing.

How sure we are: Measured from the org's API data at run time (source: UserLicense WHERE Status = 'Active' AND TotalLicenses > 0, excluding free and integration license types, summed per license type). Benchmark: 80 to 90% (Zylo 2025 SaaS Management Index; consultancy target). Confirm business context with the org owner before acting.

2. Permission set license utilization [High]

1062 of 227618 permission set licenses assigned (0.5%), against a benchmark of 80% or higher.

Why it matters: Permission set licenses for add-on products (analytics, AI, industry features) are often purchased in bulk and never assigned.

How sure we are: Measured from the org's API data at run time (source: PermissionSetLicense WHERE Status = 'Active' AND 0 < TotalLicenses < 100000 (site-wide grants excluded)). Benchmark: 80% or higher (Consultancy target). Confirm business context with the org owner before acting.

3. Unused paid user licenses [High]

20184 unused licenses are provisioned but unassigned.

Why it matters: Unassigned seats are pure cost until the contract is renegotiated.

How sure we are: Measured from the org's API data at run time (source: Sum of TotalLicenses minus UsedLicenses over paid license types). Benchmark: fewer than 50 unused seats (Consultancy target). Confirm business context with the org owner before acting.

Recommended actions

Action	Owner	Effort	When
Paid user license types, utilization. Review each license type with low utilization against the contract and remove or downgrade the unused seats at renewal.	Business Owner	Low	First 30 days
Permission set license utilization. Assign the licenses that have a business owner and remove the rest from the next order form.	Business Owner	Low	Days 31 to 60
Unused paid user licenses. Build the unused-seat list into the renewal brief and negotiate the count down.	Executive Sponsor	Low	First 30 days

User Experience and Configuration score 5.6

What we found

1. Custom fields on Opportunity [High]

Opportunity has 816 custom fields, against a benchmark of 50 to 100 custom fields on a core object.

Why it matters: Cluttered core objects slow down page loads and data entry for the sales team and push the object toward the platform field limit.

How sure we are: Measured from the org's API data at run time (source: Tooling API: CustomField WHERE EntityDefinitionId = 'Opportunity'). Benchmark: 50 to 100 custom fields on a core object (Consultancy target; Salesforce limit is 500 per object on Enterprise Edition and 800 on Unlimited). Confirm business context with the org owner before acting.

2. Custom fields on Account [High]

Account has 843 custom fields, against a benchmark of 50 to 100 custom fields on a core object.

Why it matters: Account is shared by every team, so field sprawl here affects everyone and makes the record page the slowest in the org.

How sure we are: Measured from the org's API data at run time (source: Tooling API: CustomField WHERE EntityDefinitionId = 'Account'). Benchmark: 50 to 100 custom fields on a core object (Consultancy target; Salesforce limit is 500 per object on Enterprise Edition and 800 on Unlimited). Confirm business context with the org owner before acting.

3. Custom fields on Lead [High]

Lead has 870 custom fields, against a benchmark of 50 to 100 custom fields on a core object.

Why it matters: Lead fields multiply the conversion mapping and marketing integration surface, so each unused field adds maintenance cost.

How sure we are: Measured from the org's API data at run time (source: Tooling API: CustomField WHERE EntityDefinitionId = 'Lead'). Benchmark: 50 to 100 custom fields on a core object (Consultancy target). Confirm business context with the org owner before acting.

4. Custom fields on Contact [High]

Contact has 505 custom fields, against a benchmark of 50 to 100 custom fields on a core object.

Why it matters: Contact fields are where personal data accumulates, so sprawl here is both a usability and a privacy concern.

How sure we are: Measured from the org's API data at run time (source: Tooling API: CustomField WHERE EntityDefinitionId = 'Contact'). Benchmark: 50 to 100 custom fields on a core object (Consultancy target). Confirm business context with the org owner before acting.

5. Profiles **[High]**

The org maintains 54 profiles, against a benchmark of under 15, with permission sets carrying the differences.

Why it matters: Every profile is a full copy of object, field and app settings that must be updated for each change, and profile sprawl is the main reason permission audits fail.

How sure we are: Measured from the org's API data at run time (source: `SELECT COUNT() FROM Profile`). Benchmark: under 15, with permission sets carrying the differences (Salesforce guidance toward a permission-set-led access model). Confirm business context with the org owner before acting.

6. Custom fields in the org **[High]**

The org carries 46982 custom fields, against a benchmark of under 5,000 for a single-cloud org.

Why it matters: Every unused field is a decision a user, an integration and a report builder has to make, and a place where bad data can hide.

How sure we are: Measured from the org's API data at run time (source: Tooling API: `SELECT COUNT() FROM CustomField`; top objects from `GROUP BY EntityDefinitionId`). Benchmark: under 5,000 for a single-cloud org (Consultancy judgment). Confirm business context with the org owner before acting.

7. Custom fields on Case **[Medium]**

Case has 244 custom fields, against a benchmark of 50 to 100 custom fields on a core object.

Why it matters: Service agents work in Case all day, so every unnecessary field costs handling time.

How sure we are: Measured from the org's API data at run time (source: Tooling API: `CustomField WHERE EntityDefinitionId = 'Case'`). Benchmark: 50 to 100 custom fields on a core object (Consultancy target). Confirm business context with the org owner before acting.

8. Custom objects **[High]**

The org defines 1529 custom objects, against a benchmark of under 200 for a single-cloud org.

Why it matters: A large custom data model is harder to secure, report on and integrate, and much of it is often unused.

How sure we are: Measured from the org's API data at run time (source: Tooling API: `SELECT COUNT() FROM CustomObject` (includes custom settings and metadata types)). Benchmark: under 200 for a single-cloud org (Consultancy judgment). Confirm business context with the org owner before acting.

9. Most page layouts on one object **[High]**

The busiest object has 61 layouts on Customer_Onboarding.

Why it matters: Many layouts on one object usually means many profiles and record types to maintain for the same change.

How sure we are: Measured from the org's API data at run time (source: Tooling API: `Layout GROUP BY TableEnumOrd`). Benchmark: 5 or fewer layouts per object (Consultancy target). Confirm business context with the org owner before acting.

10. Lightning record pages **[High]**

The org has 337 record pages.

Why it matters: Duplicate or unassigned record pages are a common source of inconsistent user experience across apps and profiles.

How sure we are: Measured from the org's API data at run time (source: Tooling API: FlexiPage WHERE Type = 'RecordPage'). Benchmark: under 100 (Consultancy judgment). Confirm business context with the org owner before acting.

11. Active record types **[High]**

There are 153 active record types.

Why it matters: Record types multiply layouts, picklist values and automation branches, so unused ones carry hidden maintenance cost.

How sure we are: Measured from the org's API data at run time (source: RecordType WHERE IsActive = true). Benchmark: under 50 (Consultancy judgment). Confirm business context with the org owner before acting.

Recommended actions

Action	Owner	Effort	When
Custom fields on Opportunity. Reduce the Opportunity layout to the fields sales actually uses with Dynamic Forms, and retire or hide the rest based on population data.	Salesforce Admin	Medium	Days 31 to 60
Custom fields on Account. Group fields by team with Dynamic Forms visibility rules and retire fields with no population.	Salesforce Admin	Medium	Days 31 to 60
Custom fields on Lead. Retire unused Lead fields and simplify the lead conversion mapping.	Salesforce Admin	Medium	Days 31 to 60
Custom fields on Contact. Retire unused Contact fields and classify the remaining ones with the data sensitivity level.	Salesforce Admin	Medium	Days 31 to 60
Profiles. Consolidate to a small set of baseline profiles and move differences into permission sets and permission set groups.	Security Lead	High	Days 31 to 60
Custom fields in the org. Run a field usage analysis, retire fields with no population and no references, and require a documented owner for new fields.	Salesforce Admin	High	Days 31 to 60
Custom fields on Case. Trim the Case layout to the agent workflow and retire unused fields.	Salesforce Admin	Medium	Days 31 to 60
Custom objects. Inventory custom objects with record counts and last activity, and retire the empty or dormant ones.	Salesforce Admin	High	Days 31 to 60

Most page layouts on one object. Consolidate layouts with Dynamic Forms visibility rules and retire layouts assigned to no profile.	Salesforce Admin	Medium	Days 31 to 60
Lightning record pages. Review page assignments per app, record type and profile and remove pages that are not activated anywhere.	Salesforce Admin	Low	Days 31 to 60
Active record types. Deactivate record types with no records created in the last year.	Salesforce Admin	Low	Days 31 to 60

Technical Health and Release Practice score 45.8

What we found

1. Org-wide Apex test coverage **[High]**

Org-wide coverage is 74% covered (last test run), against a benchmark of 85% or higher (75% is the deployment minimum).

Why it matters: Coverage near the 75% floor means a single failing test can block every production deployment, and low coverage hides regressions.

How sure we are: Measured from the org's API data at run time (source: Tooling API: ApexOrgWideCoverage.PercentCovered (reflects the last test run; tests are not executed by this assessment)). Benchmark: 85% or higher (75% is the deployment minimum) (Salesforce Apex Developer Guide: 75% org-wide coverage required to deploy). Confirm business context with the org owner before acting.

2. Workflow rules **[High]**

22 workflow rules (retired technology) remain.

Why it matters: Workflow rules are out of support and run outside the Flow execution order, which complicates every automation change.

How sure we are: Measured from the org's API data at run time (source: Tooling API: SELECT COUNT() FROM WorkflowRule). Benchmark: 0 (Salesforce end of support for Workflow Rules and Process Builder (December 31, 2025)). Confirm business context with the org owner before acting.

3. Most validation rules on one object **[High]**

The busiest object has 64 active rules on Opportunity, against a benchmark of under 20 per object.

Why it matters: Dozens of rules on one object make it hard for users to save records and hard for admins to predict which rule will fire.

How sure we are: Measured from the org's API data at run time (source: Tooling API: ValidationRule GROUP BY EntityDefinitionId). Benchmark: under 20 per object (Consultancy target). Confirm business context with the org owner before acting.

4. Active flows (unmanaged) **[High]**

The org runs 365 active flows, against a benchmark of under 100 for a single-cloud org, scaling with size.

Why it matters: Large automation estates produce order-of-execution conflicts, slow saves and long regression cycles for every release.

How sure we are: Measured from the org's API data at run time (source: FlowDefinitionView WHERE IsActive = true AND ManageableState = 'unmanaged'). Benchmark: under 100 for a single-cloud org, scaling with size (Consultancy judgment). Confirm business context with the org owner before acting.

5. **Active Process Builder processes [Medium]**

2 active processes (retired technology) remain.

Why it matters: Process Builder is out of support, so any defect in these processes has no vendor fix and each one blocks the retirement of the legacy engine.

How sure we are: Measured from the org's API data at run time (source: FlowDefinitionView WHERE IsActive = true AND ProcessType = 'Workflow'). Benchmark: 0 (Salesforce end of support for Workflow Rules and Process Builder (December 31, 2025)). Confirm business context with the org owner before acting.

6. **Metadata deployments in the last 365 days [Medium]**

6 deployments were recorded in the last year, against a benchmark of at least twice a month.

Why it matters: Infrequent deployments usually mean large risky releases or changes made directly in production.

How sure we are: Measured from the org's API data at run time (source: Tooling API: DeployRequest WHERE CreatedDate = LAST_N_DAYS:365). Benchmark: at least twice a month (Gearset State of Salesforce DevOps report (frequent small releases)). Confirm business context with the org owner before acting.

7. **Installed packages [High]**

78 installed packages are installed, against a benchmark of under 30.

Why it matters: Each package is a vendor dependency with its own release cycle, security posture and storage footprint.

How sure we are: Measured from the org's API data at run time (source: Tooling API: InstalledSubscriberPackage). Benchmark: under 30 (Consultancy judgment). Confirm business context with the org owner before acting.

8. **Active record-triggered flows [High]**

131 record-triggered flows fire on record changes.

Why it matters: Multiple record-triggered flows on the same object make save order unpredictable and are the usual cause of recursion and CPU limit errors.

How sure we are: Measured from the org's API data at run time (source: FlowDefinitionView WHERE IsActive = true AND TriggerType IN (RecordAfterSave, RecordBeforeSave, RecordBeforeDelete)). Benchmark: one before-save and one after-save flow per object (Salesforce Architects: record-triggered flow design patterns). Confirm business context with the org owner before acting.

9. **Apex classes (unmanaged) [High]**

The org contains 1953 Apex classes, against a benchmark of under 300 for a single-cloud org.

Why it matters: Large Apex estates lengthen test runs and deployments and concentrate knowledge in a few developers.

How sure we are: Measured from the org's API data at run time (source: Tooling API: ApexClass WHERE ManageableState = 'unmanaged'). Benchmark: under 300 for a single-cloud org (Consultancy judgment). Confirm business context with the org owner before acting.

10. Apex triggers (unmanaged) [Medium]

There are 36 Apex triggers.

Why it matters: Multiple triggers on one object have no guaranteed order, which produces intermittent defects that are expensive to reproduce.

How sure we are: Measured from the org's API data at run time (source: Tooling API: ApexTrigger WHERE ManageableState = 'unmanaged'). Benchmark: one trigger per object (Apex best practice: one trigger per object with a handler framework). Confirm business context with the org owner before acting.

11. Apex classes on API version below 45 [Medium]

3 classes below API 45.0.

Why it matters: Old API versions keep legacy behaviors alive and will eventually stop compiling when the version is retired.

How sure we are: Measured from the org's API data at run time (source: Tooling API: ApexClass WHERE ManageableState = 'unmanaged' AND ApiVersion < 45). Benchmark: 0 (Salesforce API retirement schedule (versions 21 to 30 retired, 31 to 40 deprecated)). Confirm business context with the org owner before acting.

12. Active validation rules [High]

The org enforces 593 active validation rules, against a benchmark of under 150 for a single-cloud org.

Why it matters: Every validation rule is a potential blocker for integrations and data loads and needs a bypass strategy.

How sure we are: Measured from the org's API data at run time (source: Tooling API: ValidationRule WHERE Active = true). Benchmark: under 150 for a single-cloud org (Consultancy judgment). Confirm business context with the org owner before acting.

Recommended actions

Action	Owner	Effort	When
Org-wide Apex test coverage. Raise coverage on the classes that change most often first, and add assertions to tests that only exercise code.	Developer	Medium	Days 31 to 60
Workflow rules. Migrate workflow rules to Flow and delete them after a parallel-run period.	Developer	Medium	First 30 days
Most validation rules on one object. Review the rules on the busiest object with the business, merge overlapping conditions, and retire rules for retired processes.	Business Owner	Medium	Days 31 to 60
Active flows (unmanaged). Inventory flows per object, consolidate record-triggered flows to one per object and phase, and retire flows with no runs in the last quarter.	Developer	High	Days 31 to 60
Active Process Builder processes. Migrate the remaining processes to Flow with the Migrate to Flow tool and deactivate the originals.	Developer	Medium	First 30 days

Metadata deployments in the last 365 days. Adopt a release cadence with small, frequent, tested deployments through a pipeline.	Developer	Medium	Days 31 to 60
Installed packages. Audit package usage, uninstall packages with no active users or business owner, and check that the rest passed the AppExchange security review.	Salesforce Admin	Medium	Days 31 to 60
Active record-triggered flows. Consolidate to one orchestrating flow per object and trigger phase, with subflows for logic.	Developer	High	Days 31 to 60
Apex classes (unmanaged). Identify classes with no references or no coverage, retire dead code, and enforce static analysis on new code.	Developer	High	Days 31 to 60
Apex triggers (unmanaged). Adopt a trigger handler framework with one trigger per object.	Developer	High	Days 31 to 60
Apex classes on API version below 45. Bump the API version of these classes in a maintenance release with regression tests.	Developer	Low	Days 31 to 60
Active validation rules. Consolidate overlapping rules, add a bypass custom permission for integrations, and document the business owner of each rule.	Salesforce Admin	Medium	Days 31 to 60

90-Day Action Plan

The plan sequences every recommendation by urgency and effort. Items in the first 30 days remove risk or cost immediately; days 31 to 60 clean up configuration and technical debt; the last stretch becomes the standing quarterly routine.

Quick wins (low effort, meaningful impact)

- **High-risk security settings:** Fix each high-risk setting or document an accepted exception; export the Health Check risk list as the tracking artifact. Salesforce Admin
- **Profiles granting Modify All Data:** Restrict Modify All Data to the system administrator profile and grant temporary elevated access through permission sets with expiry. Salesforce Admin
- **Paid user license types, utilization:** Review each license type with low utilization against the contract and remove or downgrade the unused seats at renewal. Business Owner
- **Permission set license utilization:** Assign the licenses that have a business owner and remove the rest from the next order form. Business Owner
- **Permission sets granting Modify All Data:** Review every assignment of these permission sets, remove stale ones, and add expiry dates to the rest. Salesforce Admin
- **Lightning record pages:** Review page assignments per app, record type and profile and remove pages that are not activated anywhere. Salesforce Admin
- **Active record types:** Deactivate record types with no records created in the last year. Salesforce Admin
- **Unused paid user licenses:** Build the unused-seat list into the renewal brief and negotiate the count down. Executive Sponsor
- **Apex classes on API version below 45:** Bump the API version of these classes in a maintenance release with regression tests. Developer

First 30 days (11 items)

Action	Owner	Effort	Area
Security Health Check score. Work through the high-risk settings in the Health Check page first (session settings, MFA, login IP ranges), then the medium-risk items, and re-run Health Check after each change.	Security Lead	Medium	Access and Security
Profiles with View All or Modify All on sensitive objects. Remove View All and Modify All from non-administrator profiles, move the genuine needs into narrowly scoped permission sets, and validate with the client which objects hold sensitive data.	Security Lead	Medium	Access and Security

Workflow rules. Migrate workflow rules to Flow and delete them after a parallel-run period.	Developer	Medium	Technical Health and Release Practice
High-risk security settings. Fix each high-risk setting or document an accepted exception; export the Health Check risk list as the tracking artifact.	Salesforce Admin	Low	Access and Security
Integration users without View All Data or Modify All Data. Move integrations to dedicated API-only users on the free Salesforce Integration license, scope their permission sets to the objects they touch, and restrict them by IP range.	Developer	Medium	Access and Security
Largest object's share of data storage. Set a retention policy for the dominant object, archive records past it to external storage, and add a scheduled purge so the share stops growing.	Salesforce Admin	Medium	Data Footprint
Profiles granting Modify All Data. Restrict Modify All Data to the system administrator profile and grant temporary elevated access through permission sets with expiry.	Salesforce Admin	Low	Access and Security
Paid user license types, utilization. Review each license type with low utilization against the contract and remove or downgrade the unused seats at renewal.	Business Owner	Low	Licensing and Spend
Active Process Builder processes. Migrate the remaining processes to Flow with the Migrate to Flow tool and deactivate the originals.	Developer	Medium	Technical Health and Release Practice
Permission sets granting Modify All Data. Review every assignment of these permission sets, remove stale ones, and add expiry dates to the rest.	Salesforce Admin	Low	Access and Security
Unused paid user licenses. Build the unused-seat list into the renewal brief and negotiate the count down.	Executive Sponsor	Low	Licensing and Spend

Days 31 to 60 (22 items)

Action	Owner	Effort	Area
Org-wide Apex test coverage. Raise coverage on the classes that change most often first, and add assertions to tests that only exercise code.	Developer	Medium	Technical Health and Release Practice
Custom fields on Opportunity. Reduce the Opportunity layout to the fields sales actually uses with Dynamic Forms, and retire or hide the rest based on population data.	Salesforce Admin	Medium	User Experience and Configuration

Custom fields on Account. Group fields by team with Dynamic Forms visibility rules and retire fields with no population.	Salesforce Admin	Medium	User Experience and Configuration
Custom fields on Lead. Retire unused Lead fields and simplify the lead conversion mapping.	Salesforce Admin	Medium	User Experience and Configuration
Custom fields on Contact. Retire unused Contact fields and classify the remaining ones with the data sensitivity level.	Salesforce Admin	Medium	User Experience and Configuration
Most validation rules on one object. Review the rules on the busiest object with the business, merge overlapping conditions, and retire rules for retired processes.	Business Owner	Medium	Technical Health and Release Practice
Profiles. Consolidate to a small set of baseline profiles and move differences into permission sets and permission set groups.	Security Lead	High	User Experience and Configuration
Permission set license utilization. Assign the licenses that have a business owner and remove the rest from the next order form.	Business Owner	Low	Licensing and Spend
Active flows (unmanaged). Inventory flows per object, consolidate record-triggered flows to one per object and phase, and retire flows with no runs in the last quarter.	Developer	High	Technical Health and Release Practice
Metadata deployments in the last 365 days. Adopt a release cadence with small, frequent, tested deployments through a pipeline.	Developer	Medium	Technical Health and Release Practice
Installed packages. Audit package usage, uninstall packages with no active users or business owner, and check that the rest passed the AppExchange security review.	Salesforce Admin	Medium	Technical Health and Release Practice
Custom fields in the org. Run a field usage analysis, retire fields with no population and no references, and require a documented owner for new fields.	Salesforce Admin	High	User Experience and Configuration
Custom fields on Case. Trim the Case layout to the agent workflow and retire unused fields.	Salesforce Admin	Medium	User Experience and Configuration
Custom objects. Inventory custom objects with record counts and last activity, and retire the empty or dormant ones.	Salesforce Admin	High	User Experience and Configuration

Most page layouts on one object. Consolidate layouts with Dynamic Forms visibility rules and retire layouts assigned to no profile.	Salesforce Admin	Medium	User Experience and Configuration
Lightning record pages. Review page assignments per app, record type and profile and remove pages that are not activated anywhere.	Salesforce Admin	Low	User Experience and Configuration
Active record types. Deactivate record types with no records created in the last year.	Salesforce Admin	Low	User Experience and Configuration
Active record-triggered flows. Consolidate to one orchestrating flow per object and trigger phase, with subflows for logic.	Developer	High	Technical Health and Release Practice
Apex classes (unmanaged). Identify classes with no references or no coverage, retire dead code, and enforce static analysis on new code.	Developer	High	Technical Health and Release Practice
Apex triggers (unmanaged). Adopt a trigger handler framework with one trigger per object.	Developer	High	Technical Health and Release Practice
Apex classes on API version below 45. Bump the API version of these classes in a maintenance release with regression tests.	Developer	Low	Technical Health and Release Practice
Active validation rules. Consolidate overlapping rules, add a bypass custom permission for integrations, and document the business owner of each rule.	Salesforce Admin	Medium	Technical Health and Release Practice

Days 61 to 90 and every quarter (0 items)

- **Re-run this review** against the same scoring model version so the scores stay comparable, and walk the deltas in the quarterly review meeting.
- **Track the plan** in one place with an owner and a date per item; the scorecard in this document is the baseline.

Appendix: Scoring Model and Data Sources

Each indicator is read from the org at review time and placed in one of four bands: healthy (100 points), watch (60), act (20), or beyond the act threshold (0). An area's score is the weighted average of its indicators; the Org Health Index is the weighted average of the areas (access and security 30, data footprint 15, licensing and spend 15, user experience 20, technical health 20). Grades: A at 90 or above, B at 80, C at 70, D at 60, F below 60. Healthy ranges marked as our targets are professional judgment informed by the cited sources, not published statistics, and are tuned per client before the second review.

Indicator	Observed	How it was read	Healthy range source
Security Health Check score	80% of the Salesforce baseline	Tooling API: SELECT Score FROM SecurityHealthCheck	Salesforce Help: How Is the Health Check Score Calculated (90+ Excellent, 80-89 Very Good, 70-79 Good, 55-69 Poor)
High-risk security settings	11 high-risk settings	Tooling API: SecurityHealthCheckRisks WHERE RiskType = 'HIGH_RISK'	Salesforce Baseline Standard (Health Check)
Profiles with View All or Modify All on sensitive objects	20 of 54 profiles (37.0%)	ObjectPermissions on ('Contact','Lead','Account') with PermissionsModifyAllRecords or PermissionsViewAllRecords, profile-owned	Salesforce Security Implementation Guide: View All and Modify All are intended for administrators; consultancy target
Profiles granting Modify All Data	4 of 54 profiles	PermissionSet WHERE IsOwnedByProfile = true AND PermissionsModifyAllData = true	Consultancy target based on Salesforce least-privilege guidance
Permission sets granting Modify All Data	4 permission sets	PermissionSet WHERE IsOwnedByProfile = false AND PermissionsModifyAllData = true	Consultancy target
Integration users without View All Data or Modify All Data	6 of 8 integration users (75.0%)	Active users on the Salesforce Integration license or an Integration/API profile; compliant = profile lacks ModifyAllData and ViewAllData	Salesforce best practice: one dedicated API-only user per integration on the Salesforce Integration license
Active users with no login in 90 days	0 of 1388 active users (0.0%)	User WHERE IsActive = true AND UserType = 'Standard' AND LastLoginDate < LAST_N_DAYS:90	Consultancy target; note that sandbox login data is not representative

Largest object's share of data storage	Schedules holds 56% of used data storage (31.5 MB, 16,115 records)	Setup > Storage Usage page, Current Data Storage Usage table, read with the review session	Consultancy target; Setup > Storage Usage
Data storage used	55 MB of 200 MB (27.5%)	REST /limits DataStorageMB (Max minus Remaining); record counts from /limits/recordCount	Consultancy target; Salesforce storage allocations by edition
File storage used	0 MB of 200 MB (0.0%)	REST /limits FileStorageMB; latest file versions from ContentVersion	Consultancy target; Salesforce storage allocations by edition
Legacy Attachments as a share of used file storage	0 attachments, 0.0 MB (0.0% of used file storage)	Attachment COUNT(Id), SUM (BodyLength) versus FileStorageMB used	Salesforce direction: Files replaced Notes and Attachments in Lightning Experience
Closed tasks older than two years	0 of 0 tasks (0.0%)	Task WHERE IsClosed = true AND CreatedDate < LAST_N_YEARS:2 (archived activities excluded)	Consultancy target
Custom fields in the org	46982 custom fields	Tooling API: SELECT COUNT() FROM CustomField; top objects from GROUP BY EntityDefinitionId	Consultancy judgment
Custom fields on Opportunity	816 custom fields	Tooling API: CustomField WHERE EntityDefinitionId = 'Opportunity'	Consultancy target; Salesforce limit is 500 per object on Enterprise Edition and 800 on Unlimited
Custom fields on Account	843 custom fields	Tooling API: CustomField WHERE EntityDefinitionId = 'Account'	Consultancy target; Salesforce limit is 500 per object on Enterprise Edition and 800 on Unlimited
Custom fields on Lead	870 custom fields	Tooling API: CustomField WHERE EntityDefinitionId = 'Lead'	Consultancy target
Custom fields on Contact	505 custom fields	Tooling API: CustomField WHERE EntityDefinitionId = 'Contact'	Consultancy target
Custom fields on Case	244 custom fields	Tooling API: CustomField WHERE EntityDefinitionId = 'Case'	Consultancy target

Custom objects	1529 custom objects	Tooling API: SELECT COUNT() FROM CustomObject (includes custom settings and metadata types)	Consultancy judgment
Most page layouts on one object	61 layouts on Customer_Onboarding	Tooling API: Layout GROUP BY TableEnumOrId	Consultancy target
Lightning record pages	337 record pages	Tooling API: FlexiPage WHERE Type = 'RecordPage'	Consultancy judgment
Active record types	153 active record types	RecordType WHERE IsActive = true	Consultancy judgment
Profiles	54 profiles	SELECT COUNT() FROM Profile	Salesforce guidance toward a permission-set- led access model
Salesforce (full CRM) license utilization	1381 of 1397 Salesforce licenses in use (98.9%)	UserLicense WHERE Name = 'Salesforce' (UsedLicenses / TotalLicenses)	Zylo 2025 SaaS Management Index (54% average utilization across SaaS); consultancy target for core CRM seats
Paid user license types, utilization	1381 of 21565 licenses in use (6.4%)	UserLicense WHERE Status = 'Active' AND TotalLicenses > 0, excluding free and integration license types, summed per license type	Zylo 2025 SaaS Management Index; consultancy target
Unused paid user licenses	20184 unused licenses	Sum of TotalLicenses minus UsedLicenses over paid license types	Consultancy target
Permission set license utilization	1062 of 227618 permission set licenses assigned (0.5%)	PermissionSetLicense WHERE Status = 'Active' AND 0 < TotalLicenses < 100000 (site- wide grants excluded)	Consultancy target
Unused managed package seats	0 of 0 package seats in use	PackageLicense WHERE AllowedLicenses > 0 (site-wide licenses with AllowedLicenses = -1 excluded)	Consultancy target
Outbound change sets	0 outbound change sets	Setup > Outbound Change Sets page, list rows counted, read with the review session	Gearset State of Salesforce DevOps report (adoption of version control and CI/CD)
Inbound change sets	0 inbound change sets	Setup > Inbound Change Sets page, list rows counted, read with the review session	Gearset State of Salesforce DevOps report (adoption of version control and CI/CD)

Active flows (unmanaged)	365 active flows	FlowDefinitionView WHERE IsActive = true AND ManageableState = 'unmanaged'	Consultancy judgment
Inactive flows as a share of all flows	15 of 380 flows inactive (3.9%)	FlowDefinitionView WHERE IsActive = false AND ManageableState = 'unmanaged'; oldest listed in details	Sweep, 7 Metrics That Reveal Your True Salesforce Technical Debt (inactive automation below 10% good, above 20% poor)
Active record-triggered flows	131 record-triggered flows	FlowDefinitionView WHERE IsActive = true AND TriggerType IN (RecordAfterSave, RecordBeforeSave, RecordBeforeDelete)	Salesforce Architects: record-triggered flow design patterns
Active Process Builder processes	2 active processes (retired technology)	FlowDefinitionView WHERE IsActive = true AND ProcessType = 'Workflow'	Salesforce end of support for Workflow Rules and Process Builder (December 31, 2025)
Workflow rules	22 workflow rules (retired technology)	Tooling API: SELECT COUNT() FROM WorkflowRule	Salesforce end of support for Workflow Rules and Process Builder (December 31, 2025)
Apex classes (unmanaged)	1953 Apex classes	Tooling API: ApexClass WHERE ManageableState = 'unmanaged'	Consultancy judgment
Apex triggers (unmanaged)	36 Apex triggers	Tooling API: ApexTrigger WHERE ManageableState = 'unmanaged'	Apex best practice: one trigger per object with a handler framework
Org-wide Apex test coverage	74% covered (last test run)	Tooling API: ApexOrgWideCoverage. PercentCovered (reflects the last test run; tests are not executed by this assessment)	Salesforce Apex Developer Guide: 75% org-wide coverage required to deploy
Apex classes on API version below 45	3 classes below API 45.0	Tooling API: ApexClass WHERE ManageableState = 'unmanaged' AND ApiVersion < 45	Salesforce API retirement schedule (versions 21 to 30 retired, 31 to 40 deprecated)
Active validation rules	593 active validation rules	Tooling API: ValidationRule WHERE Active = true	Consultancy judgment
Most validation rules on one object	64 active rules on Opportunity	Tooling API: ValidationRule GROUP BY EntityDefinitionId	Consultancy target

Metadata deployments in the last 365 days	6 deployments	Tooling API: DeployRequest WHERE CreatedDate = LAST_N_DAYS:365	Gearset State of Salesforce DevOps report (frequent small releases)
Deployments made with change sets	0 of 6 deployments via change sets (0.0%)	Tooling API: DeployRequest WHERE ChangeSetName != null (inbound change sets; API- based tools show as Type = Api)	Gearset State of Salesforce DevOps report (adoption of version control and CI/CD)
Installed packages	78 installed packages	Tooling API: InstalledSubscriberPackage	Consultancy judgment