Field Trip Analysis

AVAILABLE AS STANDALONE OR PART OF Security + Access Manager Suite

WHITEPAPER

The hidden costs of **unused** & **underused fields** in Salesforce

How Salesforce teams can improve data quality, reduce technical debt and make safer field-cleanup decisions.

ApplicationPerfection
applicationperfection.com

Salesforce environments rarely remain as simple as they were at implementation

The result is field sprawl
& limited visibility into which fields still matter.

As business requirements evolve, administrators add new fields to support processes, integrations, reporting requirements, departmental requests and temporary projects.

Existing fields are modified, replaced or gradually fall out of use, but they are rarely reviewed with the same consistency with which new fields are created.

Over time, the result is field sprawl.

An organisation may have hundreds or thousands of fields across its Salesforce environment, with limited visibility into which are actively used, which matter only to specific processes, and which have become redundant.

The challenge is not simply identifying empty fields. A field with little or no data may still be referenced by a Flow, report, page layout or permission set or other Salesforce component. Conversely, a field that contains data may no longer play a meaningful role in the organisation.

Field Trip Analysis provides Salesforce teams with the evidence needed to answer that question. By combining field-population analysis with Record Type usage, layout visibility, security exposure, dependency analysis and deletion-risk assessment, teams can move from assumption-based cleanup to structured, evidence-led field governance.

This whitepaper examines the causes and consequences of field sprawl, explains why traditional cleanup methods fall short, and outlines a safer framework for improving Salesforce data quality and reducing technical debt.



A DIFFICULT GOVERNANCE QUESTION

Which fields are genuinely valuable, which require review, and which can be safely retired?

WHAT THIS PAPER COVERS

The causes and consequences of field sprawl

Why traditional cleanup methods fall short

A framework for safer field governance

How Salesforce field sprawl develops

Salesforce is designed to adapt to the business.

That flexibility is one of the platform's greatest strengths, but it also makes it extremely easy for the data model to expand.

NEW FIELDS ARE COMMONLY CREATED TO SUPPORT

New business processes	**Reporting requirements**	**Integrations**	**Department-specific needs**	**New products or services**
Temporary projects	**Regulatory requirements**	**Data migrations**	**Automation**	**New Record Types**

Individually these changes are justified; the problem appears over time, as processes change, projects finish, integrations are replaced and teams restructure. Fields are superseded by newer fields, while the original configuration remains.

FIVE KINDS OF FIELD YOU MAY FIND IN A SALESFORCE ORG

Unused	No records contain a value
Underused	Only a very small proportion of records use the field
Segment-specific	Largely unused overall, but important to a particular Record Type
Obsolete	Contains historical data but no longer supports an active requirement
Technically embedded	Appears unused from a data perspective but is referenced elsewhere

Without regular analysis, these different categories become almost impossible to distinguish at scale.

ILLUSTRATIVE EXAMPLE — 1,500 FIELDS ACROSS CORE OBJECTS

52% NEED INVESTIGATION

18% have no populated values

14% populated on fewer than 5% of records

11% primarily used by one Record Type

9% barely populated but still referenced

That could leave hundreds of fields requiring investigation before an administrator can confidently determine what should be retained, reviewed or retired.

The challenge is not finding fields.
It is establishing what those fields actually do.

The risk of deciding without context

A POPULATION REPORT ANSWERS

"How much data does this field contain?"

IT CANNOT ANSWER

"Is this field safe to remove?"

A FIELD WITH 0% POPULATION COULD STILL BE REFERENCED BY

Flows	**Validation Rules**	**Workflows**	**Apex or code**	**Triggers**
Reports	**Dashboards**	**List Views**	**Page Layouts**	**Lightning Pages**

FTA's deletion-risk assessment combines population evidence with security, layout and dependency information specifically to help teams make safer retirement decisions.

Low Population **Does Not Always Mean Low Value**

Consider a custom field populated on only 3% of Account records.
At first glance, it may appear to be an obvious cleanup candidate.

POPULATED ON

3%

of Account records — **apparently an obvious cleanup candidate.**

FURTHER INVESTIGATION MAY REVEAL

- Heavily used by one Account Record Type
- Multiple reports depend upon it
- It drives a business-critical Flow
- Specific profiles require access
- It appears on specialist page layouts
- Removal could disrupt a live process

Field Trip Analysis

Field Trip Analysis enables field usage to be examined by Record Type, distinguishing genuinely low-value fields from fields important to a specific segment. Its deletion-risk assessment combines population evidence with security, layout and dependency information.

THE PRINCIPLE

Population tells you how often a field contains data.
Context tells you whether the field matters.
Effective governance requires both.

The hidden cost of field sprawl

Unused and poorly governed fields may appear harmless, but **their impact accumulates** across five areas of the Salesforce environment.

How the cost compounds



When users do not understand why a field exists, data quality inevitably suffers, and administrators inherit the complexity whether or not the field still provides value.

A safer approach to field rationalisation

Effective field cleanup should not begin with deletion. It should begin with evidence. A structured field-governance process divides into six stages, each answering a question the previous stage cannot.

THE SEQUENCE → MEASURE → INVESTIGATE → ASSESS → DECIDE

STAGES ONE TO THREE · ESTABLISH THE EVIDENCE

1 Measure population

Establish how extensively each field is populated: completely empty, very low-use, partially populated and frequently populated.

FTA reports both the population percentage and the exact populated-record count, so administrators see volume rather than percentages alone.

2 Investigate actual usage

Drill into the records containing values: which records, what values are present, when the field last changed, who changed it, and the source of the change where available .

FTA uses field-history information where available and falls back to the record's Last Modified Date when it is not.

3 Understand segment usage

A field may be irrelevant to most records but essential to one business process.

Analyse usage by Record Type to identify concentrations within particular segments before making organisation-wide decisions.

STAGES FOUR TO SIX · ASSESS AND DECIDE

4 Review visibility & security

Determine where the field appears and who can access it: page layouts, Record Type relationships, profile assignment context and Permission Sets.

FTA identifies the layouts containing or missing a field, and folds Profile and Permission Set exposure into its risk assessment.

5 Identify dependencies

Before modifying or removing a field, identify the Salesforce components that rely upon it.

FTA groups dependencies across programmatic, automation, UI and reporting categories, with direct Visibility into components that rely on individual fields.

6 Decide, document & repeat

Classify fields for action, retain previous results and repeat the analysis periodically.

Field governance should become an ongoing process rather than a one-off cleanup exercise.

Evidence in one place, before you delete

Instead of relying on spreadsheets, manual queries or population percentages alone, **Field Trip Analysis** brings multiple forms of field evidence together into a structured single analysis workflow.

Field Trip Analysis

Field population analysis

Standard, custom and optionally managed-package fields: 0% populated, low-use, partially and highly populated — with exact record counts and automated **Keep**, **Review** and **Remove** recommendations.

Flexible analysis

Target up to five standard, custom or managed objects in a single analysis, filtered by Record Type, Last Modified Date or custom SOQL criteria. Teams can analyse the whole object or focus on specific business units, processes or record populations.

Usage by segment

Break field usage down by Record Type to identify fields that appear unused globally but are important to one business process.

Dependency analysis

Understand which components reference a field across programmatic, automation, reporting and UI categories before making changes.

Deletion risk analysis

FTA combines nine forms of evidence into a numerical risk score and a plain-language risk assessment for every retirement candidate.

- Population
- Security assignments
- Profile exposure
- Permission Set exposure
- Page layout exposure
- Automation dependencies
- Code dependencies
- Reporting & UI dependencies

Repeatable governance

Create reusable templates and schedule recurring weekly, monthly or quarterly analyses, with results emailed automatically.

Historical tracking

Retain and compare results over time to track data-quality scores, field counts and cleanup activity.

EVIDENCE IN

Population & record counts + **Record Types & layouts** + **Profiles & Permission Sets** = DECISION OUT **Keep, Review or Remove**

Demonstrating business impact

Field cleanup is often viewed as technical housekeeping. In reality, a well-managed data model can create measurable benefits across administration, data quality and change management.

ILLUSTRATIVE FIELD-RATIONALISATION PROJECT — **FOUR CORE OBJECTS** n = 1,840

1,840	Fields analysed	
312	Fields with 0% population	
226	Additional fields below 5% population	
173	Fields requiring dependency or business review	
148	Fields ultimately approved for retirement	

Population analysis reduced the review scope from **1,840 fields to 538 candidates**, so manual governance effort went only to the fields that genuinely required human judgement.

POTENTIAL ADMINISTRATIVE SAVINGS PER REVIEW CYCLE

BEFORE STRUCTURED ANALYSIS

25–35 hrs

Collecting field data, building spreadsheets, investigating dependencies and coordinating review.

WITH FIELD TRIP ANALYSIS

6–10 hrs

Focused on reviewing results and validating business decisions.

POTENTIAL REDUCTION

60–75%

Less administrative effort per governance cycle.

Illustrative example based on a representative Salesforce field-governance project.

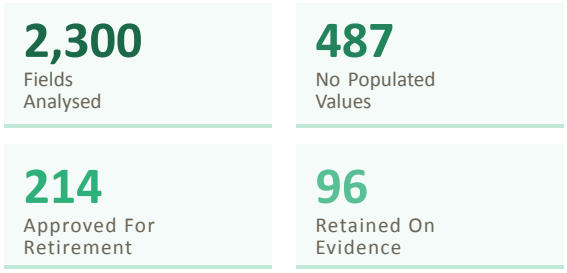
Field governance in practice

Example 01

Large scale field rationalisation

An organisation analysed 2,300 fields across its highest-use Salesforce objects: 487 held no populated values and another 291 sat below 5%. After reviewing dependencies, layouts, permissions and Record Type usage, 214 fields were approved for retirement and 96 retained because they supported active processes not apparent from population alone.

Outcome — A cleaner data model without unnecessary change risk.

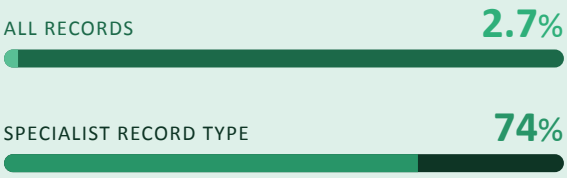


Example 02

Protecting a business-critical field

A field populated on just 2.7% of Opportunity records looked like a strong removal candidate. Usage-by-segment analysis showed 74% population within one specialist Opportunity Record Type, and dependency analysis identified related automation and reporting.

Outcome — The organisation avoided removing a low-volume but business-critical field.

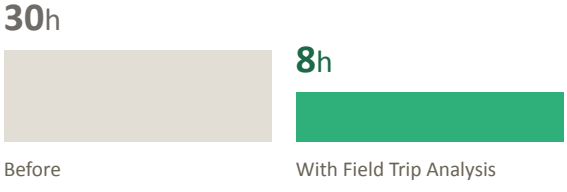


Example 03

Reducing manual review effort

An administration team previously spent around 30 hours each quarter exporting field information, comparing spreadsheets and investigating cleanup candidates. By creating reusable templates and scheduled analyses, manual preparation fell to around 8 hours per quarter.

Outcome — An illustrative annual saving of 88 administrative hours.



Illustrative examples based on representative Salesforce field-governance projects.

The objective is not to delete as many fields as possible. **It is to understand the purpose, usage and risk of every field well enough to make the right decision.**

From field sprawl to data clarity

Salesforce fields should exist because they continue to support a business, operational or technical requirement , not simply because they were created in the past. Yet as environments mature, distinguishing valuable fields from redundant ones becomes increasingly difficult.

Population percentage provides a useful starting point, but it is not enough. **Field Trip Analysis** brings the evidence together, enabling administrators to approach cleanup with greater speed, structure and confidence.

WHERE TEAMS START



Sprawl

Thousands of fields, no reliable view of which still support a requirement.

WHAT FTA ADDS



Evidence

Population, segment usage, layout visibility, security exposure and dependencies.

WHAT TEAMS GAIN



Clarity

Decisions made with speed, structure and confidence — with evidence behind each one.

EFFECTIVE GOVERNANCE REQUIRES TEAMS TO UNDERSTAND

- Whether a field contains meaningful data
- Who has access to it
- Which records and segments use it
- What components depend upon it
- Where the field is visible
- What risk removal would introduce

IN SHORT

Understand the purpose, usage and risk of every field—**then decide.**

With **Field Trip Analysis**, Salesforce teams can

- Identify empty and low-use fields
- Measure field-population and data-quality trends
- Understand usage by Record Type
- Review page-layout and security exposure
- Identify dependencies before making changes
- Assess deletion risk
- Create repeatable field-review templates
- Schedule recurring analyses
- Export and share findings
- Maintain a history of governance reviews

FTA's documented capabilities span field population, drill-down analysis, deletion-risk scoring, dependency analysis, Record Type segmentation, scheduled reviews, exports and historical tracking.

Learn more about Field Trip Analysis at **applicationperfection.com**

ABOUT APPLICATION PERFECTION

Application Perfection develops Salesforce-native applications designed to help organisations manage the complexity that builds up as Salesforce environments grow.

Our solutions help teams improve visibility, reduce administrative effort and strengthen governance across field usage, permissions, user access, reporting and data management.

Discuss your next field-cleanup or data-governance project.

applicationperfection.com · team@applicationperfection.com

Field Trip Analysis

AVAILABLE AS STANDALONE OR PART OF Security + Access Manager Suite