

10 Things Every Salesforce Admin Should Check This Month

XENOGENIX

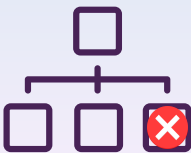
A 10-minute monthly checklist to keep your Salesforce org healthy, secure and delivering value.

Spend 10 Minutes now. Save hours later.

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Are Any Flows Failing?

- Check For:
- ☐ Failed Flow interviews
 - ☐ Paused interviews
 - ☐ Recent automation errors



Why it matters

Failed automation often goes unnoticed until users report missing updates or broken processes.

Quick win
Removing inactive users improves security and keeps licence usage under control.



Are Your Users Still Active?

- Review:
- ☐ Inactive users
 - ☐ New starters
 - ☐ Leavers
 - ☐ Unused licences

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Is Your Data Still Clean?

- Look for:
- ☐ Duplicate Accounts
 - ☐ Duplicate Contacts
 - ☐ Missing key fields
 - ☐ Recently imported data



Ask yourself

Can I trust the reports my leadership team is looking at?

Identify Problems

A failed integration can quietly create major data quality issues.



Are Integrations Running Smoothly?

- Check:
- ☐ Scheduled jobs
 - ☐ Integration logs
 - ☐ Failed API calls
 - ☐ Connected Apps

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Who Has System Administrator Access?

- Review:
- ☐ New admins
 - ☐ Temporary access not removed
 - ☐ Permission Set assignments



Good practice

Only grant the access people genuinely need.

Question

Has every change been documented and assigned an owner?



What Has Been Added This Month?

- Check:
- ☐ Fields
 - ☐ Flows
 - ☐ Validation Rules
 - ☐ Reports
 - ☐ Objects

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Are Dashboards Telling the Right Story?

- Ask:
- ☐ Are dashboards still used?
 - ☐ Is data being exported instead?
 - ☐ Have business priorities changed?



Keep Up-to Date

If nobody is looking at a dashboard, it's time to review it.

Why?

A prioritised backlog is much easier to manage than a long list of competing requests.



Is Your Backlog Under Control?

Separate requests into four categories:

Quick Wins

Strategic Projects

Nice to Have

Not Right Now

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Have You Reviewed the Latest Salesforce Release?

- Every release, ask:
- ☐ Which features could save time?
 - ☐ Which features need testing?
 - ☐ Which features should we enable?



Ahead of the curve

Don't wait until users ask about new functionality.

What Is Your Biggest Risk Right Now?

Finish every month by asking:

"If I was away for two weeks, what would worry me the most about this Salesforce org?" Your answer usually highlights the next improvement you should prioritise.

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Final Thought

The healthiest Salesforce environments aren't maintained through major projects - they're maintained through small, consistent improvements.

Spending just 10 minutes each month reviewing these areas can help prevent technical debt, improve user confidence and keep your platform delivering value.

Need a Second Opinion?

Even the best-managed Salesforce orgs can benefit from a fresh perspective. Whether you're planning improvements, tackling technical debt or simply want reassurance that everything is running as it should, an independent review can uncover opportunities that are easy to miss.

Book a free 30-minute Salesforce Health Check.



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Small Consistent actions prevent big problems.

salesforce

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