



Salesforce Health Calculator for health check and change management

About the Client

The client is one of the leading independent power producers in US. With time their Sales process changed to accommodate new business requirements, but the undocumented Salesforce Org did not catch up.

Business Needs

- Update required for incorporating new sales process.
- Clean up required on fields, workflows, processes, validations, reports not in use.
- No documentation on past ad hoc customizations.
- Need requirements and change management linked to Salesforce customizations and releases.

Solution

- ✓ Identified key areas (automation, validations, custom fields).
- ✓ Advanced Reports on field usage, user activity, automation status.
- ✓ Diagrams for HOW the business process works.
- ✓ Analysis on WHAT was customized in Salesforce and WHY – linking requirements, user stories and other documents to processes and deployments.
- ✓ Resolved 'build or modify' and 'need to delete' queries from Admins.



[Zoom View](#)

Benefits

- 27% manual effort reduction for impact analysis due to changes.
- Worry free clean up of Org ensured no discontinuity in the existing setup.
- Admins saved 8-man days of work which would be needed post clean up.
- Time spent to search for information reduced by 30%.