



Salesforce Org Health Review

Cedar Grove Health

Cedar Grove Health

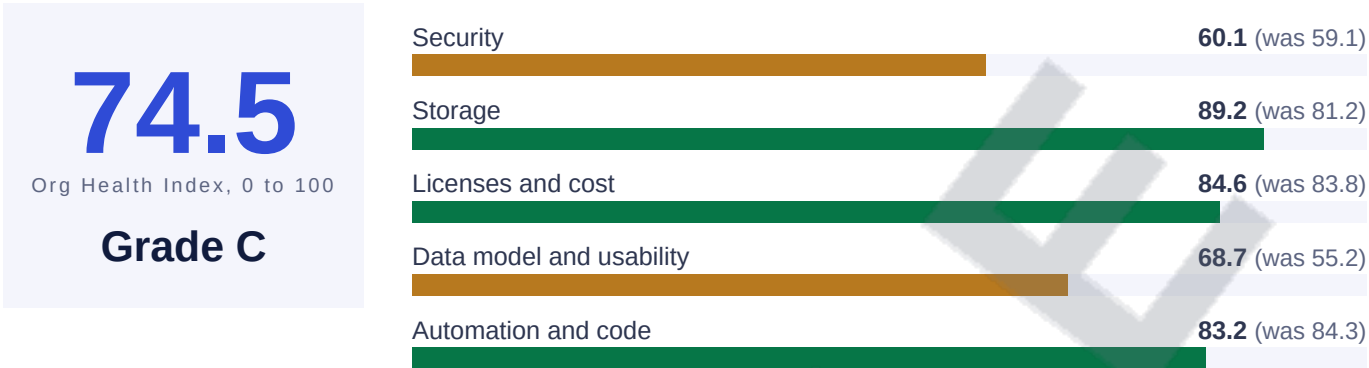
Sample report: a fictional organization with made-up data

Org Id	00D8c000004CgRvEAK	Org type	production
Review date	September 14, 2026	Reference	RUN-2026-0180
Prepared for	Dana Whitfield, Director of Enterprise Applications		
Indicators	55 across five areas		

Org Health Index, 0 to 100
74.5 Grade C

Prepared by Dream | dream.cloud | Read-only review: every number was read from the org's own APIs; nothing in the org was changed.

How healthy is the org?



We measured 55 indicators of the Cedar Grove Health Salesforce org across five areas and scored each one against the healthy range described in the scoring appendix. 13 indicators sit outside their healthy range. No area scores below 50; the items below are individual indicators to tune rather than structural problems. The previous review (RUN-2026-0178) scored 70.4.

Since the previous review (RUN-2026-0178): 4 indicators moved back into their healthy range, 2 left it, and 11 are still outside it. Each indicator whose status changed shows its previous status in the scorecard.

For a healthcare organization, the access and data findings below also bear on HIPAA.

Licenses you could reclaim

Licensed users and licenses	How many	What to do
Signed in within 90 days	313	Keep
No sign-in for 90 days	53	Deactivate them to free their licenses
Integration accounts	2	Not counted: they sign in through the API, so their last sign-in says little
No sign-in, but scheduled work still runs as them	3	Not counted: hand the scheduled jobs, dashboards and approvals over first, then deactivate
Licenses nobody is assigned to	38	Reduce them at your renewal
Licenses you could reclaim	91	about USD 180,180 a year at USD 165.00 a month

From this review's user and license counts. Confirm against your contract before acting on the dollars.

Where to start

Quick fixes first, then the items that need your decision, then projects. The quick fixes lift the Org Health Index from 74.5 to about 76.3; with your decisions, about 83.8. Projects add the rest over one or two quarters. Every number in this review was read from the org's own APIs and Setup pages on September 14, 2026; nothing in the org was changed.

Action	Area	Owner	Effort	Adds	How
High-risk Health Check settings below the baseline. Fix each high-risk setting or document an accepted exception; export the Health Check risk list as the tracking artifact. Open in Setup	Security	Salesforce Admin	Low	+1.4	Quick fix
Flows close to the 50-version limit. Delete old inactive versions, keeping the active one and a recent fallback. Open in Setup	Automation and code	Salesforce Admin	Low	+0.4	Quick fix
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. Open in Setup	Security	Developer	Medium	+2.8	Your decision
Data storage used. Purge or archive the largest low-value objects first (closed activities, email messages, history tables), then set a retention policy so the growth does not return. Open in Setup	Storage	Salesforce Admin	Medium	+1.6	Your decision
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. Open in Setup	Security	Security Lead	Medium	+1.6	Your decision
Active users on the standard System Administrator profile. Keep two or three named administrators on it and move everyone else to a custom profile with permission sets for what they need. Open in Setup	Security	Security Lead	Medium	+1.4	Your decision

Risks that add up

Findings that are more serious together than apart.

Unused accounts with admin-level access [High]

1 person has not signed in for 90 days (or ever) and still holds a profile that can change every record (Modify All Data). An account nobody uses, with full access, is an easy way in. Freeze or deactivate the ones you do not need.

- Backup Admin (Cedar Grove Admin)

Unused integration users that can see every record [High]

1 integration user can see or change every record and has not signed in for 90 days. If the integration is retired, deactivate the user; if not, give it a permission set with only the access it needs.

- Fax Relay Integration (svc.faxrelay@cedargrove.example)

Commentary

Executive summary

The Org Health Index stands at 74.5, a grade of C, up from 70.4 previously. Thirteen findings fall outside the healthy range, and four are high severity. The top priority is that 37% of custom fields on the main records stay empty on every record created in the last year. Fields nobody fills in still crowd the page, slow down reports and make every change harder to assess. The most serious security finding is that 29% of custom access groups can read or change every sensitive record. The first move is for the Salesforce Admin to check each empty field for references in reports, flows, custom code and integrations, then delete it or take it off the layouts.

What each area score means

Security · 60.1

Security scores 60.1, up from 59.1, in the watch band covering 50 to 80. This is driven by 29% of custom access groups able to read or change every sensitive record.

Storage · 89.2

Storage scores 89.2, up from 81.2, placing it in the healthy band of 80 or more. This reflects that 82% of the data storage allowance is already used.

Licenses and cost · 84.6

Licenses and cost scores 84.6, up from 83.8, within the healthy band of 80 or more. This is driven by 93 of 130 full CRM licenses being in use.

Data model and usability · 68.7

Data model and usability scores 68.7, up from 55.2, in the watch band covering 50 to 80. This is driven by 37% of custom fields on main records staying empty across every record created in the last year.

Automation and code · 83.2

Automation and code scores 83.2, down from 84.3, still in the healthy band of 80 or more. Custom code testing across the whole system covers 73%, below the minimum required before new code can go live.

Since the previous review

The Org Health Index rose from 70.4 to 74.5, with the grade holding at C. Security improved from 59.1 to 60.1, storage from 81.2 to 89.2, licenses and cost from 83.8 to 84.6, and data model and usability from 55.2 to 68.7. Automation and code declined from 84.3 to 83.2. Four findings were fixed, including screen flows that run without sharing, and two are new, including active users with no sign-in in 90 days.

Why the high-severity findings matter

Custom fields left empty for a year (core objects)

37% of custom fields on the main records have stayed empty on every record created in the last year. Unused fields crowd the page, slow reports, and make every change harder to assess.

Custom profiles with View All or Modify All on sensitive objects

29% of custom access groups can read or change every sensitive record. This undermines least-privilege access and, in regulated settings, can affect compliance obligations.

Integration users without View All Data or Modify All Data

2 of 4 integration users can see or change every record. If a connected system is breached, that credential could expose or corrupt every record.

Org-wide Apex test coverage

Custom code testing across the whole system covers 73% of code, below the 75% minimum required before new code can go live. This can block releases and hides regressions.

Risks that add up

Unused accounts with admin-level access · critical

One account has not been signed in to for 90 days or more, and it can change every record. An unused account with full access is an easy way in.

Unused integration users that can see every record · critical

One integration account has not been used for 90 days and can see or change every record. An unwatched integration account with access to every record is an easy way in.

The next 90 days

First 30 days

The first 30 days plan 9 actions with an estimated effort of 15 days. The Security Lead will remove View All and Modify All from non-administrator profiles and move needs into scoped permission sets. The Developer will move integrations to dedicated API-only users, scoping and restricting them by IP range. The Business Owner will reassign or remove unused seats before renewal.

Days 31 to 60

Days 31 to 60 plan 3 actions with an estimated effort of 4.5 days. The Salesforce Admin will check empty fields for references before deleting or removing them from layouts, and will delete old inactive versions, keeping the active one and a recent fallback. The Developer will raise test coverage on frequently changed classes and add assertions.

Days 61 to 90

Days 61 to 90 plan 1 action with an estimated effort of 0.5 days. The Salesforce Admin will deactivate or freeze users with no login in 90 days on a monthly schedule and reclaim the licenses.

Who should own each action

Custom fields left empty for a year (core objects) · Your team

The Salesforce Admin will check each empty custom field for references in reports, flows, Apex and integrations, then delete it or remove it from layouts. This is hands-on admin work, due days 31 to 60.

Custom profiles with View All or Modify All on sensitive objects · Your team

The Security Lead will remove View All and Modify All from non-administrator profiles and move genuine needs into scoped permission sets, validating which objects hold sensitive data. This is hands-on work for the Security Lead, due in the first 30 days.

Integration users without View All Data or Modify All Data · Leadership

The Developer will move integrations to dedicated API-only users on the free Integration license, scope their permission sets, and restrict them by IP range. This needs a business decision, due in the first 30 days.

Salesforce (full CRM) license utilization · Leadership

The Business Owner will reassign or remove unused Salesforce full CRM license seats before renewal and right-size the license count in the next order form. This can only happen at license renewal, due in the first 30 days.

Data storage used · Leadership

The Salesforce Admin will purge or archive the largest low-value objects, such as closed activities, email messages and history tables, then set a retention policy. This needs a business decision, due in the first 30 days.

Security Health Check score · Leadership

The Security Lead will work through high-risk Health Check settings, including session settings, MFA and login IP ranges, then medium-risk items, re-running Health Check after each change. This needs a business decision, due in the first 30 days.

High-risk Health Check settings below the baseline · Your team

The Salesforce Admin will fix each high-risk setting or document an accepted exception, exporting the Health Check risk list as the tracking artifact. This is hands-on admin work, due in the first 30 days.

Active users on the standard System Administrator profile · Leadership

The Security Lead will keep two or three named administrators on the standard System Administrator profile and move everyone else to a custom profile with permission sets. This needs a business decision, due in the first 30 days.

Compliance frameworks

How findings in this review relate to common frameworks. This is not legal advice, and it does not say whether you meet a framework.

the HIPAA Security Rule

Five findings relate to this framework. One finding concerns custom profiles with View All or Modify All access on sensitive objects, relating to access authorization, access control, and integrity controls, and serves as evidence of whether access to sensitive records follows least privilege. Another finding concerns integration users without View All Data or Modify All Data, relating to the same three controls, and serves as evidence that connected systems get only the access they need.

SOC 2

Seven findings relate to this framework. One finding concerns custom profiles with View All or Modify All access on sensitive objects, relating to logical access security and access authorization and least privilege controls, and serves as evidence of whether access to sensitive records follows least privilege. Another finding concerns integration users without View All Data or Modify All Data, relating to access authorization and least privilege and protection from threats outside system boundaries, and serves as evidence that connected systems get only the access they need.

Questions for your team

Answers from your team confirm what should change before any work starts.

Custom profiles with View All or Modify All on sensitive objects

7 of 24 custom profiles grant View All or Modify All Records on sensitive objects. Can you confirm which objects hold your most sensitive data, and whether this is intended?

Integration users without View All Data or Modify All Data

2 of 4 integration users can see or change every record. Can you confirm which integrations are still in use and who owns each one, and whether this is intended?

Salesforce (full CRM) license utilization

93 of 130 Salesforce licenses are in use. Can you confirm the license prices in your contract and the renewal date?

Data storage used

Data storage is at 14,755 MB of 17,950 MB. Can you confirm how long each kind of record has to be kept?

Security Health Check score

The org's Security Health Check score is 75% of the Salesforce baseline. Can you confirm which security settings you have already accepted as exceptions?

What can wait

Flows close to the 50-version limit

One automated process has 40 or more saved versions, approaching the 50-version limit, with work planned for days 31 to 60.

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.

Security score 60.1 of 100, 9 indicators

Indicator	Observed	Healthy range	Goal	Status
Security Health Check score	75% of the Salesforce baseline	90% or higher	90%+	WATCH

High-risk Health Check settings below the baseline	3 settings in the High-Risk group miss the Salesforce baseline	0 settings in the High-Risk group below the Salesforce baseline	0	WATCH
Custom profiles with View All or Modify All on sensitive objects	7 of 24 custom profiles (29.2%)	below 10% of profiles	below 5%	ACT
Custom profiles granting Modify All Data	2 of 24 custom profiles (the standard System Administrator profile always has it; its users are counted separately)	2 or fewer custom profiles with Modify All Data	2 or fewer	HEALTHY
Permission sets granting Modify All Data	1 permission set	2 or fewer	2 or fewer	HEALTHY
Integration users without View All Data or Modify All Data	2 of 4 integration users can see or change every record (View All Data or Modify All Data); 2 (50.0%) cannot	90% or higher	90%+	ACT
Active users with no sign-in in 90 days	53 of 371 active users (14.3%) have not signed in for 90 days, including accounts that never signed in; not counted: 2 integration accounts and 3 people who still own scheduled jobs, dashboards or approvals (hand these over before deactivating)	below 5%	below 5%	WATCH was HEALTHY
Active users on the standard System Administrator profile	6 active users on the standard System Administrator profile, whose permissions cannot be reduced	3 or fewer people on the standard System Administrator profile	3 or fewer	WATCH
Screen flows that run without sharing	0 active screen flows run in system context without sharing	no screen flow runs in system context without sharing unless reviewed and restricted	0	HEALTHY was WATCH

Storage score 89.2 of 100, 5 indicators

Indicator	Observed	Healthy range	Goal	Status
Data storage used	14,755 MB of 17,950 MB (82.2%)	70% or less of the allocation	70% or less	WATCH

File storage used	387,006 MB of 612,352 MB (63.2%)	70% or less of the allocation	70% or less	HEALTHY was WATCH
Legacy Attachments as a share of used file storage	88,410 attachments, 15,867.2 MB (4.1% of used file storage)	below 5%	below 5%	HEALTHY was WATCH
Closed tasks older than two years	424,028 of 2,141,556 Tasks (19.8%)	below 20%, subject to the retention policy	below 20%	HEALTHY
Largest object's share of data storage	Tasks holds 29.8% of used data storage (4.3 GB, 2,141,556 records)	no single object above 40% of used data storage	below 40%	HEALTHY

Licenses and cost score 84.6 of 100, 4 of 5 indicators scored

Indicator	Observed	Healthy range	Goal	Status
Salesforce (full CRM) license utilization	93 of 130 Salesforce licenses in use (71.5%)	85 to 90%	85 to 90%	WATCH
Internal user licenses in use	352 of 390 internal user licenses in use (90.3%)	80 to 90%	80%+	HEALTHY
Unused internal user licenses	38 unused internal user licenses	fewer than 50 unused seats	fewer than 50	HEALTHY
Permission set licenses sold per seat (informational)	41 of 65 per-seat permission set licenses assigned (63.1%)	Not scored: describes the size of the org	-	SIZE
Unused managed package seats	90 of 95 package seats in use	fewer than 10 unused seats	fewer than 10	HEALTHY

Data model and usability score 68.7 of 100, 4 of 15 indicators scored

Indicator	Observed	Healthy range	Goal	Status
Custom fields in the org	1396 custom fields, not counting managed packages	Not scored: describes the size of the org	-	SIZE
Custom fields on Opportunity	64 custom fields, not counting managed packages	Not scored: describes the size of the org	-	SIZE
Custom fields on Account	188 custom fields, not counting managed packages	Not scored: describes the size of the org	-	SIZE

Custom fields on Lead	97 custom fields, not counting managed packages	Not scored: describes the size of the org	-	SIZE
Custom fields on Contact	236 custom fields, not counting managed packages	Not scored: describes the size of the org	-	SIZE
Custom fields on Case	142 custom fields, not counting managed packages	Not scored: describes the size of the org	-	SIZE
Custom objects	66 custom objects, settings and metadata types, not counting managed packages	Not scored: describes the size of the org	-	SIZE
Most page layouts on one object	9 layouts on Case	Not scored: describes the size of the org	-	SIZE
Lightning record pages	58 record pages, not counting managed packages	Not scored: describes the size of the org	-	SIZE
Active record types	34 active record types, not counting managed packages	Not scored: describes the size of the org	-	SIZE
Custom profiles	23 custom profiles (standard and site guest profiles are not counted)	Not scored: describes the size of the org	-	SIZE
Custom profiles nobody uses	0 custom profiles have no active users	no custom profile without active users	0	HEALTHY
Permission sets nobody is assigned	4 of 121 of your own permission sets have no assignment and are in no group (3.3%)	under 5% of your own permission sets with no assignment and in no group	under 5%	HEALTHY
Page layouts not assigned to anyone	7 of 143 page layouts are assigned to no profile or record type (4.9%)	under 5% of your own standard page layouts unassigned (approval and global action layouts are not counted)	under 5%	HEALTHY was WATCH

Custom fields left empty for a year (core objects)	183 of 489 custom fields on Account, Contact, Lead, Opportunity, Case were empty on every record created in the last 365 days (37.4%)	under 10% of the custom fields on Account, Contact, Lead, Opportunity and Case empty on every record created in the last 12 months	under 10%	ACT
--	---	--	-----------	------------

Automation and code score 83.2 of 100, 14 of 21 indicators scored

Indicator	Observed	Healthy range	Goal	Status
Active flows (unmanaged)	118 active flows	Not scored: describes the size of the org	-	SIZE
Inactive flows as a share of all flows	10 of 128 flows inactive (7.8%)	below 10%	below 10%	HEALTHY
Active record-triggered flows	53 record-triggered flows, not counting managed packages	Not scored: describes the size of the org	-	SIZE
Active Process Builder processes	5 active processes (retired technology), not counting managed packages	0	0	WATCH was ACT
Workflow rules (active and inactive)	10 workflow rules (retired technology), not counting managed packages	0	0	WATCH
Apex classes (unmanaged)	222 Apex classes	Not scored: describes the size of the org	-	SIZE
Apex triggers (unmanaged)	17 Apex triggers	Not scored: describes the size of the org	-	SIZE
Objects with more than one active trigger	0 objects run two or more active triggers of your own	one active trigger per object, with the logic in handler classes	0	HEALTHY
Org-wide Apex test coverage	73% covered (last test run)	85% or higher (75% is the deployment minimum)	85%+ with meaningful assertions	ACT

Apex more than 15 releases behind	0 classes and 0 triggers more than 15 releases behind API 67.0 (below 52.0)	0 classes or triggers more than 15 releases (about 5 years) behind the org's release	0	HEALTHY
Active validation rules	126 active validation rules, not counting managed packages	Not scored: describes the size of the org	-	SIZE
Most validation rules on one object	17 active rules on Referral	Not scored: describes the size of the org	-	SIZE
Successful deployments in the last 365 days	52 successful deployments	at least twice a month	twice a month or more	HEALTHY
Successful deployments made with change sets	8 of 52 successful deployments came from change sets (15.4%)	25 to 35% or lower, with the majority through DevOps tooling	below 25%	HEALTHY
Installed packages	14 installed packages	Not scored: describes the size of the org	-	SIZE
Outbound change sets	1 outbound change sets	few or none; deployments through version control	none in use	HEALTHY
Inbound change sets	2 inbound change sets	few or none; deployments through version control	none in use	HEALTHY
Active flows without a description	10 of 118 active flows have no description (8.5%)	under 10% of active flows	under 10%	HEALTHY
Active flows more than 15 releases behind	0 active flows run on an API version more than 15 releases behind API 67.0 (below 52.0, or saved before flows recorded one)	0 active flows more than 15 releases (about 5 years) behind the org's release	0	HEALTHY
Flows close to the 50-version limit	1 flow has 40 or more saved versions (Salesforce allows 50)	no flow with 40 or more saved versions	0	WATCH was HEALTHY

Objects with several record-triggered flows and no set order	0 object and timing combinations run two or more record-triggered flows where at least one has no Trigger Order	every object with two or more flows of the same timing has a set run order	0	HEALTHY
--	---	--	---	---------

SAMPLE

Security score 60.1, previously 59.1

What we found

1. **Custom profiles with View All or Modify All on sensitive objects [High]**

7 of 24 custom profiles (29.2%) 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 of custom profiles on the sensitive objects with View All or Modify All (standard profiles cannot be edited)). Benchmark: below 10% of profiles (Salesforce Security Implementation Guide: View All and Modify All are intended for administrators; consultancy target).

2. **Integration users without View All Data or Modify All Data [High]**

2 of 4 integration users can see or change every record (View All Data or Modify All Data); 2 (50.0%) cannot.

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 or API profile; any permission set granting View All Data or Modify All Data counts. Integrations that sign in as a named person or a System Administrator are not recognized by this test). Benchmark: 90% or higher (Salesforce best practice: one dedicated API-only user per integration on the Salesforce Integration license).

3. **Security Health Check score [Medium]**

The org's Security Health Check score is 75% 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: SecurityHealthCheck.Score). 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)).

4. **High-risk Health Check settings below the baseline [Medium]**

3 settings in the High-Risk group miss the Salesforce baseline.

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, High-Risk group, not meeting the standard). Benchmark: 0 settings in the High-Risk group below the Salesforce baseline (Salesforce Security Health Check, High-Risk Security Settings group).

5. Active users on the standard System Administrator profile [Medium]

6 active users on the standard System Administrator profile, whose permissions cannot be reduced, against a benchmark of 3 or fewer people on the standard System Administrator profile.

Why it matters: Everyone on this profile can change every record and setting, and a standard profile's permissions cannot be reduced.

How sure we are: Measured from the org's API data at run time (source: User, active, on the standard profile with Modify All Data (System Administrator)). Benchmark: 3 or fewer people on the standard System Administrator profile (Salesforce Security Guide, least privilege; standard profiles cannot be edited).

6. Active users with no sign-in in 90 days [Medium]

Active users with no sign-in for 90 days: 53 of 371 active users (14.3%), including accounts that never signed in, against a benchmark of below 5%.

Why it matters: Dormant accounts keep licenses on the invoice and remain valid credentials for anyone who obtains them.

How sure we are: Measured from the org's API data at run time (source: User WHERE IsActive = true AND UserType = Standard, last sign-in over 90 days ago or never (created over 90 days ago)). Benchmark: below 5% (Consultancy target; note that sandbox login data is not representative).

Recommended actions

Action	Owner	Effort	When
Custom 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	Project
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	Your decision
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	Your decision
High-risk Health Check settings below the baseline. Fix each high-risk setting or document an accepted exception; export the Health Check risk list as the tracking artifact.	Salesforce Admin	Low	Quick fix
Active users on the standard System Administrator profile. Keep two or three named administrators on it and move everyone else to a custom profile with permission sets for what they need.	Security Lead	Medium	Your decision

Active users with no sign-in in 90 days. Deactivate or freeze users with no login in 90 days on a monthly schedule and reclaim the licenses.	Salesforce Admin	Low	Every quarter
---	------------------	-----	---------------

SAMPLE

Storage score 89.2, previously 81.2

What we found

1. Data storage used [Medium]

Data storage is at 14,755 MB of 17,950 MB (82.2%), against a benchmark of 70% or less of the allocation.

Why it matters: Above the allocation Salesforce blocks record creation for integrations and users alike, and overage storage is priced far above the base allocation.

How sure we are: Measured from the org's API data at run time (source: REST /limits DataStorageMB (Max minus Remaining)). Benchmark: 70% or less of the allocation (Consultancy target; Salesforce storage allocations by edition).

Recommended actions

Action	Owner	Effort	When
Data storage used. Purge or archive the largest low-value objects first (closed activities, email messages, history tables), then set a retention policy so the growth does not return.	Salesforce Admin	Medium	Your decision

Licenses and cost score 84.6, previously 83.8

What we found

1. **Salesforce (full CRM) license utilization [Medium]**

93 of 130 Salesforce licenses in use (71.5%), against a benchmark of 85 to 90%.

Why it matters: Every unassigned full CRM license is paid for at the highest per-seat price in the contract.

How sure we are: Measured from the org's API data at run time (source: UserLicense WHERE Name = Salesforce).

Benchmark: 85 to 90% (Zylo 2025 SaaS Management Index (54% average utilization across SaaS); consultancy target for core CRM seats).

Recommended actions

Action	Owner	Effort	When
Salesforce (full CRM) license utilization. Reassign or remove unused seats before the renewal and right-size the license count in the next order form.	Business Owner	Low	At renewal (March)

Data model and usability score 68.7, previously 55.2

What we found

1. Custom fields left empty for a year (core objects) [High]

183 of 489 custom fields on Account, Contact, Lead, Opportunity, Case were empty on every record created in the last 365 days (37.4%), against a benchmark of under 10% of the custom fields on Account, Contact, Lead, Opportunity and Case empty on every record created in the last 12 months. *Why it matters:* Fields nobody fills in still crowd the page, slow down reports and make every change harder to assess.

How sure we are: Measured from the org's API data at run time (source: COUNT(field) on records created in the window, per custom field of your own that can be empty (no formula, roll-up, checkbox, long text or multi-select)).

Benchmark: under 10% of the custom fields on Account, Contact, Lead, Opportunity and Case empty on every record created in the last 12 months (Salesforce Optimizer field usage; consultancy target).

Recommended actions

Action	Owner	Effort	When
Custom fields left empty for a year (core objects). Check each empty field for references in reports, flows, Apex and integrations, then delete it or take it off the layouts.	Salesforce Admin	Medium	Project

Automation and code score 83.2, previously 84.3

What we found

1.

Org-wide Apex test coverage [High]
Org-wide Apex test coverage: 73% covered (last test run), against a benchmark of 85% or higher (75% is the deployment minimum).
Why it matters: Salesforce will not deploy code to production while coverage is under 75%, so coverage below or just above that minimum can block releases, and low coverage hides regressions.
How sure we are: Measured from the org's API data at run time (source: Tooling API: ApexOrgWideCoverage (reflects the last test run; this review runs no tests)). Benchmark: 85% or higher (75% is the deployment minimum) (Salesforce Apex Developer Guide: 75% org-wide coverage required to deploy).
2.

Active Process Builder processes [Medium]
5 active processes (retired technology), not counting managed packages, against a benchmark of 0.
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, unmanaged). Benchmark: 0 (Salesforce end of support for Workflow Rules and Process Builder (December 31, 2025)).
3.

Workflow rules (active and inactive) [Medium]
10 workflow rules (retired technology), not counting managed packages, against a benchmark of 0.
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: WorkflowRule with no namespace (the API does not say which are active)). Benchmark: 0 (Salesforce end of support for Workflow Rules and Process Builder (December 31, 2025)).
4.

Flows close to the 50-version limit [Medium]
1 flow has 40 or more saved versions (Salesforce allows 50), against a benchmark of no flow with 40 or more saved versions.
Why it matters: At 50 versions nobody can save a change to the flow until old versions are deleted, which tends to surface in the middle of an urgent fix.
How sure we are: Measured from the org's API data at run time (source: Tooling API: Flow versions per flow, no namespace, 40 or more). Benchmark: no flow with 40 or more saved versions (Salesforce General Flow Limits: 50 versions per flow).

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	Project

Active Process Builder processes. Migrate the remaining processes to Flow with the Migrate to Flow tool and deactivate the originals.	Developer	Medium	Project
Workflow rules (active and inactive). Migrate workflow rules to Flow and delete them after a parallel-run period.	Developer	Medium	Project
Flows close to the 50-version limit. Delete old inactive versions, keeping the active one and a recent fallback.	Salesforce Admin	Low	Quick fix

Action Plan

Every recommendation, grouped by how it can be fixed. The points next to each group are what its items add to the Org Health Index once each is back in its healthy range. Fixing part of an item earns part of its points.

Quick fixes (2 items, +1.8 points)

In your control, usually days of work.

Action	Owner	Effort	Area
High-risk Health Check settings below the baseline. Fix each high-risk setting or document an accepted exception; export the Health Check risk list as the tracking artifact.	Salesforce Admin	Low	Security
Flows close to the 50-version limit. Delete old inactive versions, keeping the active one and a recent fallback.	Salesforce Admin	Low	Automation and code

Your decisions (4 items, +7.4 points)

Decide each one: fix it, or keep it on purpose as an accepted exception with a reason and a review date.

Action	Owner	Effort	Area
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	Security
Data storage used. Purge or archive the largest low-value objects first (closed activities, email messages, history tables), then set a retention policy so the growth does not return.	Salesforce Admin	Medium	Storage
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	Security
Active users on the standard System Administrator profile. Keep two or three named administrators on it and move everyone else to a custom profile with permission sets for what they need.	Security Lead	Medium	Security

Projects (5 items, +13.3 points)

Planned work, usually over one or two quarters, fitted to your release rhythm.

Action	Owner	Effort	Area
--------	-------	--------	------

Custom fields left empty for a year (core objects). Check each empty field for references in reports, flows, Apex and integrations, then delete it or take it off the layouts.	Salesforce Admin	Medium	Data model and usability
Custom 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	Security
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	Automation and code
Active Process Builder processes. Migrate the remaining processes to Flow with the Migrate to Flow tool and deactivate the originals.	Developer	Medium	Automation and code
Workflow rules (active and inactive). Migrate workflow rules to Flow and delete them after a parallel-run period.	Developer	Medium	Automation and code

At your license renewal (1 item, +2.3 points)

License counts can only be reduced at the contract renewal, in March.

Action	Owner	Effort	Area
Salesforce (full CRM) license utilization. Reassign or remove unused seats before the renewal and right-size the license count in the next order form.	Business Owner	Low	Licenses and cost

Every quarter

- **Active users with no sign-in in 90 days:** Deactivate or freeze users with no login in 90 days on a monthly schedule and reclaim the licenses.
- **Re-run this review** each quarter and walk the changes 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.

What you told us

- The Salesforce contract renews in March.
- Release rhythm: monthly.
- Data to keep: Keep patient outreach and consent history for 7 years. Closed Tasks older than 2 years can be archived.
- Intentional: The referral site guest profile reads Clinic Location records on purpose.
- What matters most: security.

Appendix: Scoring Model and Data Sources

Each indicator is read from the org at review time and placed in a band: healthy, watch or act. Its score runs from 100 when healthy down to 60 at the edge of the watch band, 20 at the edge of the act band and 0 one band further, and it moves steadily with the value in between, so partial progress counts. Checks that describe the size of the org (custom fields, Apex classes, flows, installed packages and similar counts) are shown but not scored; profile checks count custom profiles only, because standard profiles cannot be edited or deleted. Items your team accepts as exceptions, with a reason and a review date, are left out of their check until that date. An area's score is the weighted average of its indicators; the Org Health Index is the weighted average of the areas (Security 30, Storage 15, Licenses and cost 15, Data model and usability 20, Automation and code 20). An area with no indicator this org can be measured on is left out, and the index is the weighted average of the areas that remain. 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	75% of the Salesforce baseline	Tooling API: SecurityHealthCheck.Score	Salesforce Help: How Is the Health Check Score Calculated (90+ Excellent, 80-89 Very Good, 70-79 Good, 55-69 Poor)
High-risk Health Check settings below the baseline	3 settings in the High-Risk group miss the Salesforce baseline	Tooling API: SecurityHealthCheckRisks, High-Risk group, not meeting the standard	Salesforce Security Health Check, High-Risk Security Settings group
Custom profiles with View All or Modify All on sensitive objects	7 of 24 custom profiles (29.2%)	ObjectPermissions of custom profiles on the sensitive objects with View All or Modify All (standard profiles cannot be edited)	Salesforce Security Implementation Guide: View All and Modify All are intended for administrators; consultancy target
Custom profiles granting Modify All Data	2 of 24 custom profiles (the standard System Administrator profile always has it; its users are counted separately)	PermissionSet WHERE IsOwnedByProfile = true AND IsCustom = true AND PermissionsModifyAllData = true	Consultancy target based on Salesforce least-privilege guidance

Permission sets granting Modify All Data	1 permission set	PermissionSet WHERE IsOwnedByProfile = false AND PermissionsModifyAllData = true (permission set groups not counted twice)	Consultancy target
Integration users without View All Data or Modify All Data	2 of 4 integration users can see or change every record (View All Data or Modify All Data); 2 (50.0%) cannot	Active users on the Salesforce Integration license or an Integration or API profile; any permission set granting View All Data or Modify All Data counts. Integrations that sign in as a named person or a System Administrator are not recognized by this test	Salesforce best practice: one dedicated API-only user per integration on the Salesforce Integration license
Active users with no sign-in in 90 days	53 of 371 active users (14.3%) have not signed in for 90 days, including accounts that never signed in; not counted: 2 integration accounts and 3 people who still own scheduled jobs, dashboards or approvals (hand these over before deactivating)	User WHERE IsActive = true AND UserType = Standard, last sign-in over 90 days ago or never (created over 90 days ago)	Consultancy target; note that sandbox login data is not representative

Active users on the standard System Administrator profile	6 active users on the standard System Administrator profile, whose permissions cannot be reduced	User, active, on the standard profile with Modify All Data (System Administrator)	Salesforce Security Guide, least privilege; standard profiles cannot be edited
Screen flows that run without sharing	0 active screen flows run in system context without sharing	Tooling API: Flow, active screen flows with RunInMode SystemModeWithoutSharing, no namespace	Salesforce Help, Flow Run Context (System Context Without Sharing, Access All Data)
Data storage used	14,755 MB of 17,950 MB (82.2%)	REST /limits DataStorageMB (Max minus Remaining)	Consultancy target; Salesforce storage allocations by edition
File storage used	387,006 MB of 612,352 MB (63.2%)	REST /limits FileStorageMB (Max minus Remaining)	Consultancy target; Salesforce storage allocations by edition
Legacy Attachments as a share of used file storage	88,410 attachments, 15,867.2 MB (4.1% of used file storage)	Attachment COUNT and SUM (BodyLength) against FileStorageMB used	Salesforce direction: Files replaced Notes and Attachments in Lightning Experience
Closed tasks older than two years	424,028 of 2,141,556 Tasks (19.8%)	Task WHERE IsClosed = true AND CreatedDate < LAST_N_YEARS:2 (archived activities excluded)	Consultancy target
Largest object's share of data storage	Tasks holds 29.8% of used data storage (4.3 GB, 2,141,556 records)	Setup, Storage Usage page, Current Data Storage Usage table	Consultancy target; Setup > Storage Usage

Salesforce (full CRM) license utilization	93 of 130 Salesforce licenses in use (71.5%)	UserLicense WHERE Name = Salesforce	Zylo 2025 SaaS Management Index (54% average utilization across SaaS); consultancy target for core CRM seats
Internal user licenses in use	352 of 390 internal user licenses in use (90.3%)	UserLicense, active internal types (community, portal, partner, external, chatter and integration types excluded)	Zylo 2025 SaaS Management Index; consultancy target
Unused internal user licenses	38 unused internal user licenses	Sum of TotalLicenses minus UsedLicenses over internal license types	Consultancy target
Permission set licenses sold per seat (informational)	41 of 65 per-seat permission set licenses assigned (63.1%)	PermissionSetLicense with no more seats than twice the active users (bulk entitlements excluded)	Consultancy target
Unused managed package seats	90 of 95 package seats in use	PackageLicense WHERE AllowedLicenses > 0 (site-wide licenses excluded)	Consultancy target
Custom fields in the org	1396 custom fields, not counting managed packages	Tooling API: CustomField with no namespace	Consultancy judgment
Custom fields on Opportunity	64 custom fields, not counting managed packages	Tooling API: CustomField on Opportunity with no namespace	Consultancy target; Salesforce limit is 500 per object on Enterprise Edition and 800 on Unlimited
Custom fields on Account	188 custom fields, not counting managed packages	Tooling API: CustomField on Account with no namespace	Consultancy target; Salesforce limit is 500 per object on Enterprise Edition and 800 on Unlimited
Custom fields on Lead	97 custom fields, not counting managed packages	Tooling API: CustomField on Lead with no namespace	Consultancy target

Custom fields on Contact	236 custom fields, not counting managed packages	Tooling API: CustomField on Contact with no namespace	Consultancy target
Custom fields on Case	142 custom fields, not counting managed packages	Tooling API: CustomField on Case with no namespace	Consultancy target
Custom objects	66 custom objects, settings and metadata types, not counting managed packages	Tooling API: CustomObject with no namespace	Consultancy judgment
Most page layouts on one object	9 layouts on Case	Tooling API: Layout with no namespace, grouped by object	Consultancy target
Lightning record pages	58 record pages, not counting managed packages	Tooling API: FlexiPage WHERE Type = RecordPage with no namespace	Consultancy judgment
Active record types	34 active record types, not counting managed packages	RecordType WHERE IsActive = true with no namespace	Consultancy judgment
Custom profiles	23 custom profiles (standard and site guest profiles are not counted)	PermissionSet owned by a custom profile, site guest profiles excluded	Salesforce guidance toward a permission-set-led access model
Custom profiles nobody uses	0 custom profiles have no active users	Profile, custom and not a site guest profile, with no active user	Salesforce permission set led access model

Permission sets nobody is assigned	4 of 121 of your own permission sets have no assignment and are in no group (3.3%)	PermissionSet, regular, no namespace, with no assignment and in no permission set group	Salesforce permission set guidance; consultancy target
Page layouts not assigned to anyone	7 of 143 page layouts are assigned to no profile or record type (4.9%)	Tooling API: standard Layout (LayoutType Standard) with no namespace and no ProfileLayout assignment	Salesforce Optimizer, unused page layouts
Custom fields left empty for a year (core objects)	183 of 489 custom fields on Account, Contact, Lead, Opportunity, Case were empty on every record created in the last 365 days (37.4%)	COUNT(field) on records created in the window, per custom field of your own that can be empty (no formula, roll-up, checkbox, long text or multi-select)	Salesforce Optimizer field usage; consultancy target
Active flows (unmanaged)	118 active flows	FlowDefinitionView WHERE IsActive = true AND ManageableState = unmanaged	Consultancy judgment
Inactive flows as a share of all flows	10 of 128 flows inactive (7.8%)	FlowDefinitionView, unmanaged, inactive versus all	Sweep, 7 Metrics That Reveal Your True Salesforce Technical Debt (inactive automation below 10% good, above 20% poor)
Active record-triggered flows	53 record-triggered flows, not counting managed packages	FlowDefinitionView, unmanaged, active, record-triggered	Salesforce Architects: record-triggered flow design patterns

Active Process Builder processes	5 active processes (retired technology), not counting managed packages	FlowDefinitionView WHERE IsActive = true AND ProcessType = Workflow, unmanaged	Salesforce end of support for Workflow Rules and Process Builder (December 31, 2025)
Workflow rules (active and inactive)	10 workflow rules (retired technology), not counting managed packages	Tooling API: WorkflowRule with no namespace (the API does not say which are active)	Salesforce end of support for Workflow Rules and Process Builder (December 31, 2025)
Apex classes (unmanaged)	222 Apex classes	Tooling API: ApexClass WHERE ManageableState = unmanaged	Consultancy judgment
Apex triggers (unmanaged)	17 Apex triggers	Tooling API: ApexTrigger WHERE ManageableState = unmanaged	Apex best practice: one trigger per object with a handler framework
Objects with more than one active trigger	0 objects run two or more active triggers of your own	Tooling API: ApexTrigger, active, no namespace, grouped by object, two or more	Salesforce Apex best practice: one trigger per object
Org-wide Apex test coverage	73% covered (last test run)	Tooling API: ApexOrgWideCoverage (reflects the last test run; this review runs no tests)	Salesforce Apex Developer Guide: 75% org-wide coverage required to deploy
Apex more than 15 releases behind	0 classes and 0 triggers more than 15 releases behind API 67.0 (below 52.0)	Tooling API: ApexClass and ApexTrigger with no namespace below the org's current API version minus 15	Salesforce API version notes; the 15-release rule is our maintenance target (Apex classes and triggers were not part of the version 21 to 30 retirement)
Active validation rules	126 active validation rules, not counting managed packages	Tooling API: ValidationRule WHERE Active = true with no namespace	Consultancy judgment
Most validation rules on one object	17 active rules on Referral	Tooling API: ValidationRule, active, no namespace, grouped by object	Consultancy target

Successful deployments in the last 365 days	52 successful deployments	Tooling API: DeployRequest, last 365 days, Status = Succeeded, validations excluded	Gearset State of Salesforce DevOps report (frequent small releases)
Successful deployments made with change sets	8 of 52 successful deployments came from change sets (15.4%)	Tooling API: DeployRequest with a ChangeSetName among successful deployments	Gearset State of Salesforce DevOps report (adoption of version control and CI/CD)
Installed packages	14 installed packages	Tooling API: InstalledSubscriberPackage	Consultancy judgment
Outbound change sets	1 outbound change sets	Setup, Outbound Change Sets page	Gearset State of Salesforce DevOps report (adoption of version control and CI/CD)
Inbound change sets	2 inbound change sets	Setup, Inbound Change Sets page	Gearset State of Salesforce DevOps report (adoption of version control and CI/CD)
Active flows without a description	10 of 118 active flows have no description (8.5%)	FlowDefinitionView, unmanaged, active, empty Description	Lightning Flow Scanner rule Missing Flow Description; consultancy target
Active flows more than 15 releases behind	0 active flows run on an API version more than 15 releases behind API 67.0 (below 52.0, or saved before flows recorded one)	Tooling API: Flow, active versions with no namespace, ApiVersion below the org's current version minus 15 or empty; surveys excluded	Salesforce Help, API Version for Running a Flow; the 15-release rule matches our Apex check
Flows close to the 50-version limit	1 flow has 40 or more saved versions (Salesforce allows 50)	Tooling API: Flow versions per flow, no namespace, 40 or more	Salesforce General Flow Limits: 50 versions per flow

Objects with several record-triggered flows and no set order	0 object and timing combinations run two or more record-triggered flows where at least one has no Trigger Order	FlowDefinitionView, unmanaged, active, record-triggered, grouped by object and timing	Salesforce Help, Flow Trigger Explorer and Trigger Order for record-triggered flows
--	---	---	---