



THE HEALTHY ORG WORKBOOK

Resources and hands-on activities for admins



INTRODUCTION

Whether you're new to Salesforce or an experienced admin, everyone can use a little help keeping their org healthy!

In these pages, you'll find all the resources you need to either get started on the right foot or reconfigure your org to be better equipped for success.

After each section, you'll have the opportunity to take your new knowledge for a spin with hands-on activities and planning resources. Follow along using the [Healthy Org Activity Template](#) to get started in your org.

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DATA SECURITY

DATA SECURITY

Did you know that over 60% of Nonprofit and Higher Ed customers have experienced a data breach at least once in the past year? If that's more than you expected, then it may be time to take a closer look at your data security. Salesforce takes data security seriously. Not only do we take [every precaution](#) to safeguard your data, but we ask you to be our partner in building and maintaining that security as well.

How Do Data Security Breaches Happen?

- Hacking or malware
- Lost or stolen electronics
- Debit/credit card fraud
- Disgruntled employees

These are just some of the more common ways that your data can be breached. Every large database is susceptible to these risks, however having a plan for data security and maintenance is your best offense.

[Learn more.](#)

3 Key Principles to Keep Your Data Safe

① Defense in Depth

[Layered security mechanisms](#), like firewalls and two-factor authentication, increase your data security.

② Principle of Least Privilege

Give users the lowest level of permissions necessary to do their job.

③ Empowered Users

Phishing is the most common form of data breach, which means users are the primary target. Educate your users on risks and share solutions.

Evaluate Permissions

Review your user profiles and permissions, then consider if anything needs modification. Build a committee of power users, executive leadership and Salesforce admins to decide each user's access level. Remember the principle of least privilege!

PROFILE	PERMISSIONS	NEEDS UPDATES
Volunteer Coordinator	Contacts: Create, Read, Edit	
Volunteer Coordinator	Opportunities: Read	Yes
Volunteer Coordinator	Users: Read, Edit	Yes

Keep Your Users In The Know

Make sure your users understand the importance of data security.

- ✓ Schedule regular [cybersecurity training](#)
- ✓ Establish a [feedback loop](#)
- ✓ Provide [resources](#) about potential risks
- ✓ Organize knowledge checks
- ✓ Make processes easy to follow

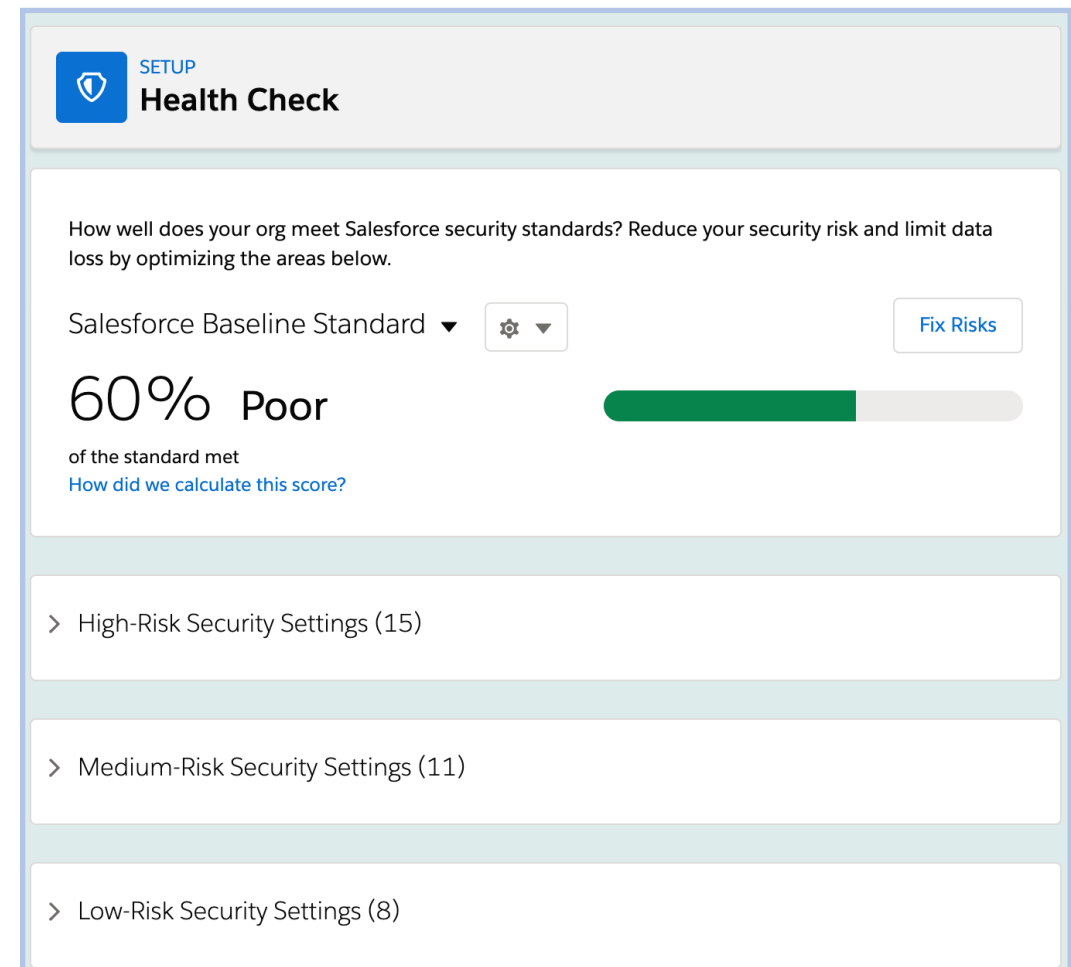
When in Doubt, Use Security Healthy Check

Salesforce has a great resource for your data security planning. Security Health Check allows admins to identify and fix potential vulnerabilities in your security settings, all from a single page.

A summary score shows how your org measures against a security baseline. While Salesforce provides a standard baseline for you, you can also create and upload up to five baselines of your own.

Consider using Health Check quarterly to ensure your org is always healthy.

Access Security Health Check by going to **Setup > Health Check** and then choose which potential risks you want to fix.





DATA QUALITY

DATA QUALITY

If you have a significant amount of data, chances are you have come across problems with data quality. You're not alone. Most commonly, bad data occurs when:

- Users have little or poor training
- There is no automated prevention in place
- Data hygiene policies are lacking
- Historical data is imported

What is “Bad” Data?

Before you can fix your data, let's think through what it actually means for your data to be “bad.” As you look through these definitions, consider which of these issues may be affecting your database.

CRITERIA	QUESTIONS TO CONSIDER
Accuracy	Does data correctly describe the “real world” object or event?
Completeness	Are all data points captured across all records?
Consistency	Are all data points captured in the same way across all records?
Timeliness	Is your data time-sensitive? Does it need to be archived after a certain point?
Uniqueness	Are all records unique (no duplicates)?
Validity	Does data conform to the syntax (format, type, range) of its definition?

Why is Bad Data Such a Big Deal?

Whether you realize it or not, data underpins everything you do. Data decides where your organization puts its money, it dictates the emails you send as well as when and how you send them, it informs your conversations with stakeholders, and drives what needs to be done next.

If your data is inaccurate or incomplete, all of that is compromised.

The more data you have, the more difficult it gets to keep it clean. To minimize data inaccuracies, make a clear plan, document it, and make sure that all of your users have access and ownership of that document. Remember, this plan will evolve as your organization's priorities and milestones change, so it's important to keep updating it.

If this sounds overwhelming, don't worry. Salesforce tools can help, and we have you covered every step of the way.

Prioritizing Your Data Cleanup

If you have a mature database, cleaning it up may not be a quick task. How do you decide where to start? As a general rule, prioritize:

- ① Highly visible, frequently viewed
- ② Duplicate records
- ③ Business-specific information
- ④ Unnecessary, unused fields

Salesforce Data Maintenance Tools

1 [Validation Rules](#)

Verify that the data a user enters in a record meets the standards you specify before the user can save the record.



Watch: [Optimize Your Org Health with Validation Rules](#)

2 [Default Values](#)

Define a default value for a field (ex: State field populates with the state of the constituent).

3 [Roll-Up Summary Fields](#)

Calculates values from related records, such as those in a related list.

4 [Page Layouts](#)

Create unique layouts for different user profiles to ensure they have the best setup to do their job.

5 [Help Text](#)

Guide users along with help text that explains what kind of data needs to be entered and the proper formatting ensure they have the best setup to do their job.

Identify Your Goals

Start thinking about your organization's goals and the data you need to measure and meet them. Setting metrics ahead of time will help focus your efforts and maximize your efficiency.

SAMPLE GOAL SETTING TABLE

METRIC	REQUIRED DATA	DATA FORMAT
Event Registration	Number of Registrants	Number field
Interest in future events	Event type	Picklist



Profile Your Data

Now that we know more about the kind of data you hope to gather, let's think about where that data may be coming from and consider potential pain points.

SAMPLE PROFILING EXERCISE

DATA ENTRY POINT	POTENTIAL PROBLEMS
Manual Data Entry	User error, lack of training, user data breach
Third-party integration	Duplicate data, API errors, different data formats

Create a Data Hygiene Schedule

Cleaning up your data once won't do any good if you don't have a data hygiene plan going forward. Use this chart as a way to stay on track. Think about your goals and review the data profile that you've already created to prioritize actions.

SAMPLE DATA HYGIENE SCHEDULE

ACTION	FREQUENCY	REVIEWERS
Review all records created last week	Weekly	Admin and staff
Setup data backup and export	Monthly	Admin

Build an Exception Report

Exception reporting is a technique designed to help you trust your data by exposing what's missing or where there might be contradictory information. For example, you can build a report that exposes any contacts that do not have an email address populated. Let's walk through building this sample report.

SAMPLE EXCEPTION REPORTS

- [Exception Reporting: An Admin's Best Friend](#)



REPORT: CONTACTS & ACCOUNTS Contacts without Email Addresses

Total Records
85

	First Name ▾	Last Name ▾	Account Name ▾	Email ▾
1	Martha	Washington	Martha Washington Administrative Account	-
2	Stacy	Cooper	Bruce Diaz Administrative Account	-
3	Tim	Barnes	Steve Bowman Administrative Account	-
4	Herbert	West	Herbert West Administrative Account	-
5	Janet	Cooper	Henry Cooper Administrative Account	-
6	Janet-Marie	Jackson	Janet-Marie Jackson Administrative Account	-
7	Bruce	Webb	Webb Administrative Account	-
8	Stacy	Cooper	Stacy Cooper Administrative Account	-
9	Tim	Barnes	Tim Barnes Administrative Account	-
10	Herbert	West	Herbert West Administrative Account	-
11	Janet	Cooper	Henry Cooper Administrative Account	-
12	Janet Dianna	Jackson	Janet Dianna Jackson Administrative Account	-





STREAMLINE **YOUR ORG**

STREAMLINE YOUR ORG

Now that your data is clean and secure, let's think about organizing your Salesforce instance with the end user in mind. Even if your data is perfect, your org won't get much use if it is not laid out in a way that makes sense to users. Streamlining your org can be boiled down to two concepts—making it easier to enter information and then making it easier to find it.

Make it Easy to Enter Information

Your users are likely entering a lot of data into Salesforce, so it's important to make the process simple and intuitive for them. Salesforce is nothing if not customizable, so creating an environment that's just right for each user is absolutely attainable. Consider the following:

- **Page Layouts:** Did you know that you can create a different page layout for each of your user profiles? That means that each user will see only the fields and information that is relevant to them.
- **Help Text:** If you want to guide your users along in entering information in a specific way, consider utilizing help text. Use this feature in cases where questions might arise—for example, since there are different ways of entering dates, you may include help text to let your users know the preferred way for your organization. If this appeals to you, you may also be interested in [in-app guidance!](#)
- **Required Fields:** Let your users know what's important by making [certain fields required](#). But, take care! While it may be tempting to mark every field as required, too many required fields will make it consuming and potentially difficult for users to enter data.

Make it Easy to Find Information

Aside from entering data, your users are likely spending a good amount of their day trying to find information within the vast Salesforce ecosystem. But there are ways you can help!

- **List Views:** Organize data into list views for easier navigation and improved actionability. For example, you may have a list view for your top donors, or for your least engaged contacts—both groups that may require some extra attention. Remember, list views can be created by users, but you as an admin can provide samples or simply educate your users on this feature. Additional things to note—list views exist on every object and can either be public or private.
- **Customized Search Results:** Make search results easier to sift through by [customizing which fields should be included](#). You can also customize which buttons display in custom list views and search results.
- **Record Types:** If you have multiple units or departments operating with different processes, [record types](#) may be a good option for your org. Each record type allows you to have a pre-set page layout with specific fields, processes, and help text.
- **Compact Layouts:** A great incentive for using Salesforce Lightning or Salesforce Mobile, [compact layouts](#) allow you to group the most important data at the top, for quick and easy viewing.

Talk to Your End Users

You can glean a lot from data, but sometimes the best insight you can get is from your users. Ask some of your end users the questions below to learn more about how you can streamline and optimize your org.

- What is your main goal with Salesforce?
- When do you find Salesforce most useful?
- What is your biggest pain point with Salesforce?
- What else would you find helpful in Salesforce?

Understand Your Business Units or Departments

If you have multiple business units or departments and are considering using record types, start by mapping out each department's data needs and processes for planning purposes.

SAMPLE BUSINESS UNIT AUDIT

BUSINESS UNIT	RECORD TYPE	VITAL INFO	STAGES
Fundraising	Major Gifts	Capacity to Give, Propensity to Give, Philanthropic Interest	Identify, Qualify, Solicitation, Cultivation, Negotiation, Received
	Gifts In-Kind	Market Value, Gift Type, Gift Description	Promised, Received, Not Received

Salesforce Optimizer

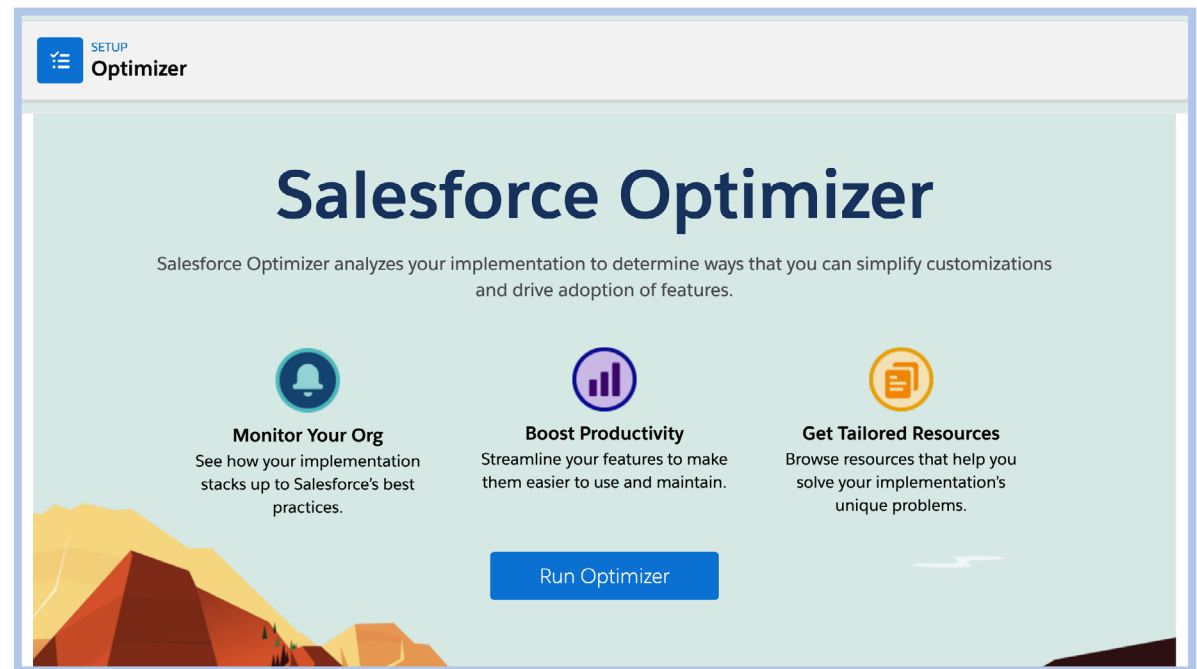
Salesforce Optimizer is a maintenance productivity app for Salesforce Admins which provides prioritized insights coupled with recommendations and best practices.

It's in your org now! Just navigate to **Setup > Optimizer > Launch**.

The Optimizer will check your org against established best practices and let you know where you are doing well and where improvements can be made. Your evaluation may be long—at times it can be over 100 pages—however, it's organized into digestible sections, so you can take it at your own pace.

Consider using Optimizer quarterly so you never miss a chance to improve your org.

Note: Optimizer is NPSP and EDA agnostic.





AUTOMATE **YOUR ORG**

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You've cleaned and streamlined, now the real fun begins. One of the most important benefits of Salesforce is the ability to automate your work. You do so much in the course of a day, let Salesforce take some things off your plate.

When to Automate

How do you decide which processes to automate and what should be done manually? Here are three key things to look for:

- ① **Repetitive Tasks:** Anything you do on a regular basis is a candidate for automation.
- ② **Repetitive Logic/Parameters:** If those repetitive tasks also have repetitive rules that always apply, that is yet another indicator that they can be automated.
- ③ **Applicable to Multiple Users:** While this is not technically required, if a repetitive process with clearly defined rules applies to multiple users, it is especially important to consider automation. Think of all the time you can save with just a few clicks!

How to Automate

To fully leverage automation tools, let's first get to know what's available.

[Process Builder](#)

Helps you automate your business processes and gives you a graphical representation as you build. Each process consists of criteria that determines when the automation should fire and actions that need to be taken as a result.

 Watch: [Optimize your Org Health with Process Builder](#)

Note: You may have encountered workflow rules in the past. While workflows are still available, Process Builder is the newer, more powerful way to automate.

[Flow](#)

A robust automation tool that often replaces the need for Apex triggers. Using drag-and-drop functionality, flows can help you do anything from mass updating/creating/deleting unrelated records based on criteria, to streamlining your opportunity creation process. If you have a complex business process that needs automating, this is probably going to be your first choice. Flows can be triggered by users, buttons, screens, or through Process builder. They can also be automatic. They are not tied to a specific object, making them extremely flexible.

 Watch: [Optimize your Org Health with Flow](#)

[Approval Process](#)

Whenever you need any record to be approved upon creation or editing, an approval process can help. By building this process, you can designate when a record should be reviewed, what steps need to be taken for it to be approved, and what actions need to be taken upon approval. You can even designate multiple approvers to ensure that nothing slips through the cracks.

Design an Approval Process

Identify what in your org will require approval and who should be providing it.

SAMPLE APPROVAL PLANNING TABLE

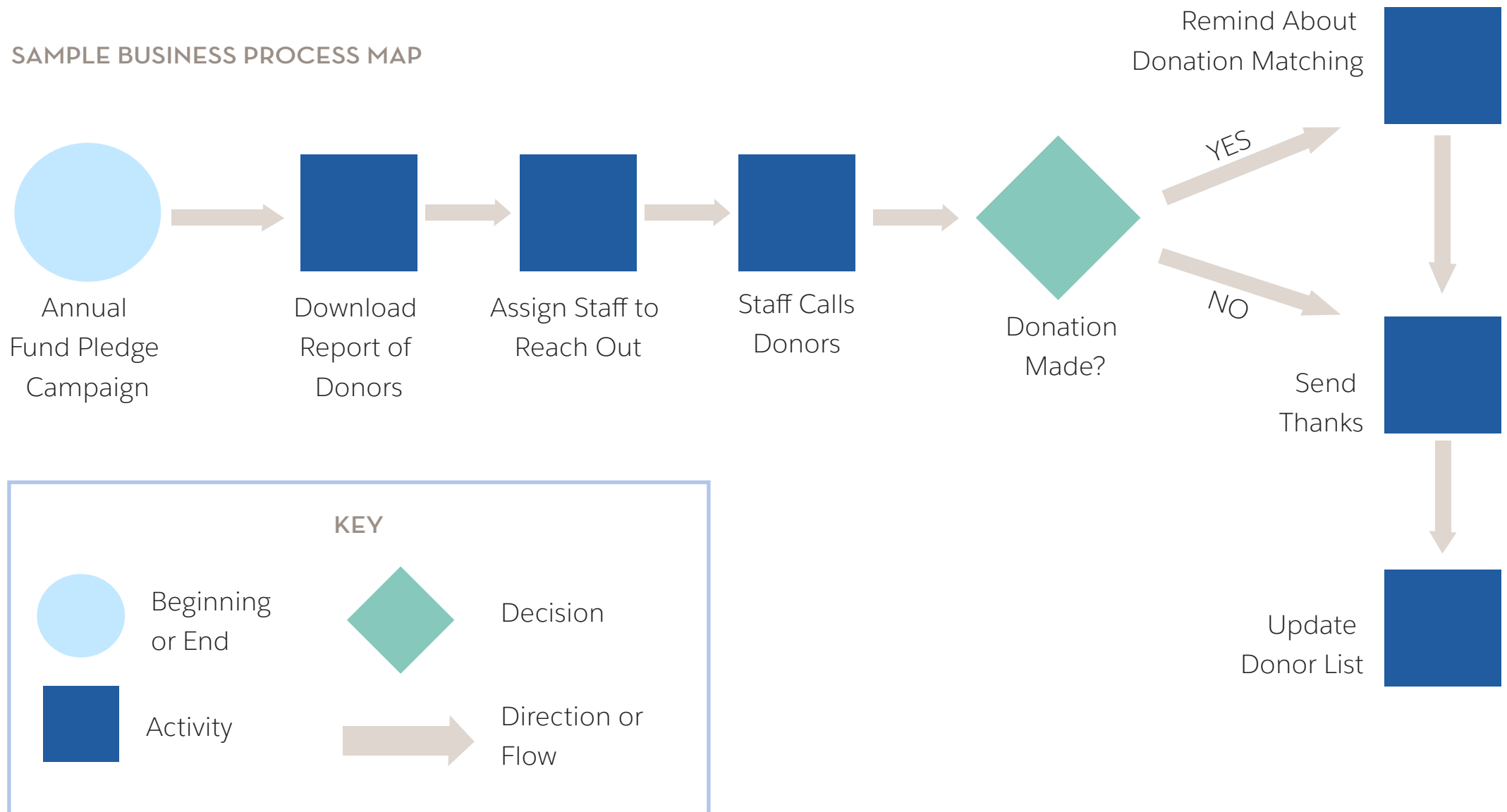
PROCESS	FIELDS INVOLVED	APPROVER	APPROVAL CRITERIA	APPROVAL ACTION
Time off request	Time-Off Balance	Manager	Time-Off Balance > 0	Update Time-Off Balance
Travel Request	Estimated Travel Balance	VP Finance	Estimated Travel Budget < 2000	Send Notification Email



Map Your Business Process

The best way to start planning your org automations is to map out your business processes. Not only will this exercise help you understand what can be automated, it will also allow you to spot pain points and create room for improvement.

SAMPLE BUSINESS PROCESS MAP





RESOURCE LIBRARY

Data Security

- [Salesforce Trust Site](#)
- Trailhead: [Protect Your Data Security](#)
- Trailhead: [Shield Platform Encryption](#)
- Trailhead: [Transaction Security](#)
- [GDPR Resource Site](#)
- Trailhead: [European Union Privacy Law Basics](#)
- [GDPR Data Processing Addendum](#)
- [View and Manage Users](#)
- [Set Password Policies](#)
- [Restrict When and Where Users Can Login to Salesforce](#)
- [Two-Factor Authentication](#)
- Power of Us Hub: [Data Security Group](#)

Streamline Your Org

- [What is Process Mapping?](#)
- Power of Us Hub: [Configuration and Customization](#)
- [Dependent Picklist Values](#)
- [Formula Fields](#)
- [Lookup Field Filters](#)

Data Quality

- Trailhead: [Data Management](#)
- Trailhead: [Data Quality](#)
- Trailhead: [Duplicate Management](#)
- Power of Us Hub Group: [Data Quality Group](#)
- [Why Every Salesforce User Needs Their Own License](#)
- [Data Quality Analysis Dashboard](#)
- [Data.com Assessment App](#)
- [Exception Reporting - An Admin's Best Friend](#)
- [Introduction to Data Governance and Stewardship](#)
- [Required Fields](#)
- [Validation Rules](#)
- [Field Update Actions](#)

Automate Your Org

- Trailhead: [Process Automation](#)
- [Choosing the Right Automation Tool](#)
- [Workflow Considerations](#)
- Trailhead: [Workflow Rule Migration](#)
- Trailhead: [Quick Start with Process Builder](#)
- [Process Builder Limits & Considerations](#)
- [Introduction to Flow Webinar](#)
- [Limits & Considerations with Flow](#)

THANK YOU

Discover more resources for Salesforce.org customers in the [Power of Us Hub](#).

