The 7-Point Salesforce Health Audit for Growing Businesses

By Infused Force | infusedforce.com

Executive Summary

Your Salesforce org should be a growth engine—not a bottleneck. This 7-point audit helps founders and sales teams identify inefficiencies, technical debt, and missed opportunities in your Salesforce instance.

Use this self-assessment to review the health of your org and decide where to take action or get expert help.

How to Use This Checklist

- Review each of the 7 sections
- Score each from 1 (Poor) to 5 (Excellent)
- Add notes and determine next steps
- Total your score for a quick readiness rating

Audit Sections

1. Lead Capture & Assignment

- Are all lead sources integrated and tracked in Salesforce?
- Are leads auto-assigned by source, territory, or rep?
- Is Web-to-Lead or form intake functioning properly?
- Are you capturing UTM/source data?

Score (1–5): _____

2. Sales Process & Stage Health

- Do you have a clearly defined Opportunity pipeline?
- Are stages tailored to your actual sales process?
- Are reps using stages consistently?
- Do conversion metrics make sense?

Score (1–5): _____

3. Support Ticket Routing & Response Times

- Are cases automatically created from support channels?
- Is routing based on priority, product, or issue type?
- Do you have SLA or first-response metrics tracked?
- Is case escalation automated?

Score (1–5): _____

4. Flow & Automation Hygiene

- Are you using Flow (instead of Workflow/Process Builder)?
- Are automation rules documented?
- Are conflicting/duplicate automations eliminated?
- Do automations run efficiently and without error?

Score (1–5): _____

5. Data Quality & Duplicates

- Is duplicate prevention/detection in place?
- Are required fields actually required?
- Are stale or orphaned records cleaned regularly?
- Is data segmented (e.g. lead vs contact vs customer)?

Score (1–5): _____

6. Customization vs. Complexity

- Are custom fields and objects documented and used purposefully?
- Are there any unused or abandoned apps/features?
- Is page layout streamlined for users?
- Are managed packages up to date?

Score (1–5): _____

7. Reporting & Dashboard Visibility

- Do you have dashboards for execs, managers, and reps?
- Are key metrics visible and accurate?
- Are reports trusted by your team?
- Can users self-serve reporting?

Score (1–5): _____

Scoring Summary

Area	Score (1–5)
Lead Capture & Assignment	_____
Sales Process & Stage Health	_____
Support Ticket Routing	_____
Flow & Automation	_____
Data Quality	_____
Customization	_____
Reporting & Dashboards	_____
Total (Max 35)	_____

Your Score

- **30–35:** Optimized & Scalable
- **22–29:** Functioning but needs refinement
- **15–21:** Needs attention soon
- **15:** Time to rebuild or get expert help

Next Steps

If you scored below 30, we recommend a deeper diagnostic and roadmap review. Schedule a free 30-minute consultation with Infused Force to turn these findings into an action plan.

Book a call: infusedforce.com/consult
Email us: info@infusedforce.com