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50-Point Salesforce Audit Checklist

Your complete guide to a healthy Salesforce org

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This checklist covers 50 critical audit points across five key areas:
Security, Data Quality, Performance, Architecture, and Business Process.

Each item goes beyond what Salesforce's built-in Health Check covers —
these are the checks a senior consultant runs on every engagement.

Security   Data Quality   Performance   Architecture   Business Process

SECURITY & ACCESS

10 ITEMS

Protect your org from unauthorized access and data exposure

01 Session Timeout Settings

Verify idle session timeout is 15-30 min. The built-in Health Check flags this but doesn't catch per-profile overrides that leave admin sessions open indefinitely.

02 Password Policy Configuration

Review complexity, minimum 12+ chars, and 90-day rotation. Go beyond defaults: check for shared service account passwords that never expire.

03 Login IP Range Restrictions

Enforce IP restrictions on admin and API profiles. Standard Health Check misses Connected App IP relaxation settings that bypass these controls.

04 API User Permission Audit

Review all integration users. Flag any with 'Modify All Data' that should use scoped permission sets instead — a blind spot in the built-in check.

05 Permission Set Group Sprawl

Count active permission set groups and identify assignment conflicts. The built-in tool doesn't analyze cumulative permission escalation across stacked sets.

06 MFA Enforcement Gaps

Verify MFA on all admin and API profiles. Check for SSO bypass paths and U2F vs TOTP coverage — the standard check only confirms MFA is 'enabled', not enforced everywhere.

07 Named Credential vs Hardcoded Secrets

Search Apex, Flows, and Custom Metadata for hardcoded API keys, tokens, or passwords. This is never flagged by the built-in Health Check.

08 Shield Event Monitoring Configuration

Audit Event Monitoring setup: are Login, API, and Report Export events being captured? Most orgs pay for Shield but don't configure the event types that matter.

09 Guest User & Community Permissions

Review all guest user profiles and Community sharing sets. Post-2020 Salesforce tightened defaults, but legacy orgs often have over-permissioned guest access.

10 Sharing Rule & OWD Review

Audit org-wide defaults and criteria-based sharing rules. Look for 'Public Read/Write' on sensitive objects — the Health Check flags OWDs but not the sharing rule exceptions that undermine them.

DATA QUALITY

10 ITEMS

Ensure your data is accurate, complete, and trustworthy

11 **Duplicate Record Detection & Rules**

Run duplicate analysis across Accounts, Contacts, and Leads. Check if duplicate rules are active or just logging — most orgs have them in 'Alert' mode, not 'Block'.

12 **Required Field Coverage**

Verify required fields on Account, Contact, Opportunity, and Case. Calculate data completeness score: aim for 90%+ on critical fields like email, phone, and industry.

13 **Validation Rule Audit**

Review all validation rules for relevance and performance impact. Deactivate rules on objects with >50 active rules — they compound to slow save transactions.

14 **Orphaned Record Cleanup**

Find Contacts without Accounts, Opportunities with inactive owners, and Cases with deleted queues. These create reporting blind spots the standard tools miss.

15 **Picklist Value Hygiene**

Audit picklist values for duplicates, typos, and retired options. Check for unrestricted picklists on fields used in reports — free-text entries destroy filter accuracy.

16 **Email Deliverability Health**

Analyze bounce rates on Contact/Lead email fields. Flag records with known-invalid domains. Orgs with >5% bounce rates get throttled by Salesforce email services.

17 **Record Ownership Distribution**

Map record ownership across active vs. inactive users. Reassign records from deactivated users — they break approval processes and escalation rules silently.

18 **Data Classification & Compliance Labels**

Check if Salesforce Data Classification is applied to PII fields. Critical for GDPR/CCPA — the built-in Health Check doesn't verify classification coverage.

19 **Field-Level Encryption Coverage**

If using Shield Platform Encryption, audit which fields are encrypted vs. which should be. Check for deterministic vs. probabilistic encryption on searchable fields.

20 **Historical Data Archival Strategy**

Document data retention policies. Identify objects exceeding 10M records that need Big Objects or external archival to maintain query performance.

PERFORMANCE

10 ITEMS

Eliminate bottlenecks and hit sub-3-second page loads

21 SOQL in Loops (Apex Anti-Pattern)

Search all Apex triggers and classes for SOQL/DML inside for-loops. This is the #1 cause of governor limit failures and the built-in optimizer doesn't scan custom Apex.

22 Flow Execution Profiling

Audit all record-triggered flows for loop count, subflow depth, and DML operations. Flows with >5 Get/Update elements per execution path need refactoring.

23 Lightning Page Component Load Times

Profile Lightning pages for slow-loading components. Identify custom LWCs making synchronous Apex calls or loading >500KB of data on render.

24 Governor Limit Consumption Monitoring

Track CPU time, query rows, and DML statements per transaction. Set up debug logs to identify transactions consistently above 70% of limits.

25 Batch & Scheduled Apex Health

Review all scheduled jobs for success rates and execution duration. Flag jobs running >10 minutes or with >1% failure rates — these indicate data or code issues.

26 Record-Triggered Flow Recursion Guards

Verify all record-triggered flows have entry conditions preventing re-fire. Check for trigger-flow-trigger chains that compound execution and hit limits.

27 Custom Index Coverage

Identify SOQL WHERE clauses on non-indexed fields in objects with >100K records. Request custom indexes from Salesforce Support for critical query patterns.

28 API Call Consumption Analysis

Track daily API call usage by connected app. Identify integrations making redundant calls or polling unnecessarily. Most orgs use <20% of their API limit inefficiently.

29 Async Apex Queue Depth

Monitor queueable, batch, and future method queue depths. Queue depths >50 during business hours indicate resource contention needing architectural review.

30 Platform Cache Utilization

Check if Platform Cache (Session/Org) is configured for frequently-accessed data. Most orgs pay for it but never implement it — can reduce SOQL usage by 40-60%.

ARCHITECTURE

Reduce tech debt and build on a solid foundation

31 Unused Custom Field Inventory

Count custom fields per object; flag fields with 0% population rate. Orgs average 340+ unused fields — each one adds metadata bloat and confuses new team members.

32 Custom Object Sprawl Assessment

Map custom objects to business processes. Identify objects with <100 records or no automation — they're likely abandoned experiments that should be archived.

33 Process Builder → Flow Migration Status

Count remaining Process Builders; prioritize migration. Salesforce has deprecated PB and will enforce migration — check for PB+Flow conflicts on the same object.

34 Workflow Rule → Flow Migration

Identify remaining Workflow Rules. These are the most common source of 'mystery automation' because they don't appear in the Flow list and are easy to forget.

35 Hard-Coded IDs in Apex & Flows

Search code for 15/18-character IDs. These break in sandbox refreshes and org migrations. Replace with Custom Metadata Types or Custom Labels.

36 Test Class Quality Assessment

Go beyond coverage %: audit test classes for meaningful assertions. Orgs with 80% coverage but no assertions have zero regression protection. Check for SeeAllData=true anti-pattern.

37 Managed Package Audit

Review all installed packages for license utilization and API version. Uninstall unused packages — each one consumes governor limits and adds deployment complexity.

38 DevOps & Deployment Pipeline Health

Document source control, CI/CD, and deployment practices. Verify sandbox refresh cadence (monthly minimum) and check for 'deploy from production' anti-patterns.

39 Custom Metadata Type Adoption

Audit use of Custom Metadata Types vs. Custom Settings vs. hardcoded values. CMDTs are deployable and testable — if you're still using List Custom Settings, it's time to migrate.

40 Technical Debt Backlog

Document known workarounds, TODO comments in code, and deferred cleanup items. Calculate hours-to-remediate and prioritize by risk. Allocate 20% of sprint capacity to paydown.

BUSINESS PROCESS　　　　　　　　　　　10 ITEMS

Align Salesforce with how your business actually operates

☐ **41 Lead-to-Opportunity Conversion Funnel**

Calculate conversion rate and average time-to-convert. Rates below 15% indicate qualification issues. Map the actual conversion path vs. what's configured.

☐ **42 Sales Stage Duration Analysis**

Analyze average days in each Opportunity stage. Flag deals stuck >2x the average — these are pipeline padding that distorts forecasting accuracy.

☐ **43 Assignment Rule Effectiveness**

Review lead and case assignment rules against current org structure. Rules pointing to inactive users or renamed queues cause silent routing failures.

☐ **44 Escalation & Entitlement Process Audit**

Verify escalation rules fire correctly and entitlement processes match current SLAs. Test with edge cases — most orgs discover broken escalations only during a crisis.

☐ **45 Email Template & Messaging Audit**

Review all active email templates for outdated branding, broken merge fields, and stale product references. Flag templates last modified >12 months ago.

☐ **46 Report & Dashboard Adoption Analytics**

Pull usage data on reports and dashboards. Orgs average 300+ reports with <20% regular usage. Consolidate duplicates and archive unused ones.

☐ **47 Automation Conflict Detection**

Map all automations (Flows, Apex, PB, WFR) per object to detect conflicts. Look for competing field updates, recursive triggers, and order-of-execution issues.

☐ **48 Agentforce & AI Readiness Assessment**

Evaluate data quality, field consistency, and process documentation readiness for Salesforce AI features. Agentforce requires clean, well-structured data to be effective.

☐ **49 Integration & Connected App Health**

Audit all connected apps and OAuth tokens. Revoke unused integrations, verify refresh token policies, and check for apps using deprecated API versions (<v55.0).

☐ **50 Change Management Documentation**

Verify release notes, runbooks, and rollback procedures exist. Check if post-deployment validation steps are documented and followed — most outages stem from undocumented changes.

You just reviewed 50 audit checkpoints across 5 categories.

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this Health Check?

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