Technical Health Audit:
Global Retailer

⊙ INTRODUCTION

This report provides an initial overview of the Salesforce implementation, focusing on core objects, workflows, automations, validation rules, and shared metadata. It highlights key areas for optimization and potential improvements to the current architecture.

◉ PRIORITY ROADMAP

Email Signature	Email Delivery	Historical Sales	Talend Integration
EVALUATE	EVALUATE	EVALUATE	PLAN
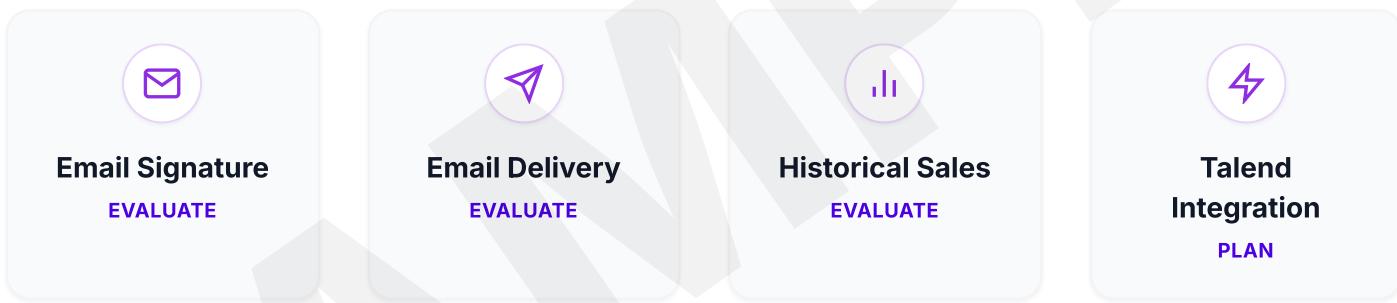
◷ EXECUTIVE SUMMARY

TOPIC	CORE ISSUE	STATUS
Email Signature Logic	Hard-coded logic limiting multi-langu...	EVALUATE
Email Delivery Timing	30-minute batch intervals causing idl...	EVALUATE
Historical Account Revenue	Rolling 12-month views lack YTD cont...	EVALUATE
Talend Integration Strategy	Enterprise ETL tool may be over-engi...	PLAN

DETAILED FINDINGS

01 Email Signature Logic

EVALUATE

> *Currently, email signatures for 'Thank You' emails are hard-coded into the program logic, limiting flexibility and multi-language support.*

CHALLENGES

- Signatures cannot be modified without development.
- Not dynamically adaptable to recipient language.

RECOMMENDATIONS

- → Move signature logic out of code to metadata.
- → Implement multi-language support.

02 Email Delivery Timing

EVALUATE

> *Delivery is currently batched every 30 minutes, creating unnecessary system load and potentially poor UX.*

CHALLENGES

- Batch jobs run even with no data (idle load).
- Potential delays for critical responses.

RECOMMENDATIONS

- → Switch to event-based triggers.
- → Make delay window configurable.

03 Historical Account Revenue

EVALUATE

> *Accounts show rolling 12-month revenue, but lack the context of YTD or historical trends.*

CHALLENGES

- Information is too contextual and lacks snapshots.
- Standard YTD comparisons are missing.

RECOMMENDATIONS

- → Implement visual revenue charts.
- → Create data model for historical snapshots.

Ready to take your **Salesforce** to the next level?

Our analysis has uncovered key areas for improvement. Our specialized services are designed to address these exact challenges.

Architecture Refactoring

We move hard-coded logic into configurable metadata, empowering admins to make changes without needing developers.

BEST FOR EMAIL LOGIC

Data Strategy

Unlock historical trends and YTD reporting. We build robust models that turn rolling 12-month views into actionable insights.

BEST FOR REPORTING

Smart Automation

Eliminate batch delays. We implement event-driven triggers to ensure your communications happen in real-time.

BEST FOR PERFORMANCE

Let's fix these issues together.

Reach out to schedule your technical deep dive.

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