

Sales & Marketing Cloud Audit

Maximizing Client's Investment in Salesforce



CloudKettle

The Challenge

The client is a multi-billion dollar organization with complex implementations of Sales and Marketing Cloud. They required an audit to assess configuration and code concerns, and make suggestions for improvements to improve data quality and contribute to improved revenue.

Over the course of 6 weeks, CloudKettle conducted meetings with multiple stakeholder groups within the Client company and performed an in-depth technical review of the Sales Cloud and Marketing Cloud orgs.

Focused Findings

1

SECURITY

High, moderate and low risk security issues were addressed in the audit, along with suggestions for keeping the orgs as secure as possible.

2

DATA STORAGE

Top objects contributing to data storage were identified, and suggestions were made regarding the management of increasing storage volumes.

3

METADATA CLEANUP

Details were provided pertaining to multiple unused fields and relationships.

4

BEST PRACTICES & NEXT STEPS

A series of recommendations were made for ways the client could align better with Salesforce best practices, including identifying short, medium and long-term goals and priorities.

Client Profile

INDUSTRY

Telecommunications

EMPLOYEES

50,000

SOLUTIONS

Sales Cloud
Marketing Cloud

AT A GLANCE

The client is a national telecommunications company with operations and revenue of over \$20 billion.

Key Metrics

The CloudKettle team undertook a 6 week process where the orgs were thoroughly reviewed and areas for optimization were identified. These were a few of the findings noted for immediate remediation:

90% of team time was spent working on new features, often for edge cases with an impact on under 5% of records

0% usage on 35 different fields

19% accounts owned by inactive users