

Data model healthcheck

Sample report

Sample report. The company, org and figures are fictional.

Prepared for	Harbor Valley Distribution (fictional)
Salesforce org	Enterprise Edition, Sales Cloud and Service Cloud, 140 users
Review	10 hours, read-only access to a full sandbox
Delivered	October 2026

Summary

The org is in reasonable shape, but duplicate accounts and unused fields are slowing the sales team down and making reports unreliable. Three changes would remove most of the friction within a month.

Scorecard

Area	Status	What we saw
Objects and relationships	Good	Clear model. Two custom objects duplicate standard ones.
Field usage	Needs attention	212 custom fields on Account; 61 are empty on 98% of records.
Duplicate records	Fix first	About 9% of active accounts have a likely duplicate.
Sharing and access	Needs attention	Org-wide default is Public Read/Write on Opportunity.
Page layouts	Good	Lightning pages are tidy; 4 unused layouts can be removed.
Data quality	Needs attention	Billing country is free text, with 38 spellings of 6 countries.

How we reviewed it

Read-only review in a full sandbox using Setup, Schema Builder, field usage reports, duplicate jobs and sample record queries. Nothing in the org was changed. This report and the walkthrough are yours to keep, with or without us.

Top three priorities

- 1. Merge duplicate accounts and turn on blocking duplicate rules**
Sales reps stop logging activity against the wrong record.
- 2. Change Opportunity sharing to Private, with team-based sharing rules**
Pipeline data is only visible to the people who should see it.
- 3. Convert Billing Country to a picklist and clean existing values**
Territory and revenue reports by country become trustworthy.

Findings, ranked by impact

Finding	Impact	Effort	Recommendation
Likely duplicate accounts (about 1,150 of 12,800)	High	Medium	Run a matching pass, merge in batches, then enable blocking duplicate rules.
Opportunity org-wide default is Public Read/Write	High	Low	Set to Private and add sharing rules by sales team.
Billing Country stored as free text	High	Medium	Enable State and Country picklists and map existing values.
61 Account fields empty on 98% of records	Medium	Medium	Confirm with owners, hide from layouts, then delete in a second pass.
Two custom objects mirror Contact and Case	Medium	High	Plan a migration to the standard objects in a later phase.
Required fields enforced by 14 validation rules	Medium	Low	Consolidate into 5 rules with clear error messages.
Record types without a business process assigned	Low	Low	Remove 3 unused record types.
4 page layouts not assigned to any profile	Low	Low	Delete after confirming with the admin.

Suggested roadmap

First 30 days	30 to 90 days	Later
Opportunity sharing, duplicate rules, layout cleanup.	Account merge, country picklists, validation rules.	Field cleanup and the move back to standard objects.

Estimated effort for the first 90 days: 35 to 45 hours.