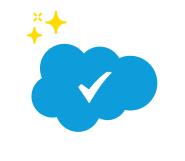# Salesforce Spring Cleaning Challenge Checklist & Tracker

How to Use This Checklist

☑ Follow the 7-day action plan to clean up and optimize your Salesforce org.

☑ Mark tasks as Not Started, In Progress, or Completed to track progress.

☑ Add notes for challenges or key observations.

☑ Share your progress on social media using #SalesforceSpringClean and tag us!

Phase 1: Assess & Plan

🎯 **Goal: Identify issues and set cleanup priorities.**

☐ Run Salesforce Optimizer to detect unused fields, reports, and automation.

☐ Review Debug Logs for slow-running processes.

☐ Analyze Data Quality Dashboards for duplicates and outdated records.

☐ Choose 3 priority areas for cleanup.

Notes:_____

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Phase 2: Clean & Optimize

Goal: Remove clutter, standardize data, and improve usability.

- ☐ Remove duplicate records using Salesforce Duplicate Rules & Matching Rules.

- ☐ Purge outdated student and alumni data for better system performance.

- ☐ Optimize page layouts by removing unused fields and decluttering forms.

- ☐ Migrate outdated workflows to Salesforce Flows for streamlined automation.

Notes:_____

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Phase 3: Secure & Maintain

Goal: Strengthen security, improve reporting, and ensure long-term maintenance.

☐ Audit user roles & permissions to prevent unauthorized access.

☐ Enable Multi-Factor Authentication (MFA) for stronger security.

☐ Clean up reports & dashboards to remove outdated and duplicate data.

☐ Conduct a team training session to ensure everyone follows best practices.

Notes:_____

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