

# Lead Magnet Opportunity: “Post-Go-Live Health Check Guide”


If your Salesforce CRM is live but not delivering, you’re not alone.

Many organizations launch quickly—without the post-launch alignment needed to make the system work long-term.

This guide helps you spot where your CRM may be off-track and shows you what steps to take next.

## Quick Self-Check—Is Your CRM Showing Signs of Misalignment?

Tick off the issues you’re experiencing:

Symptom	Check 
Users avoid entering data or use spreadsheets instead	<input type="checkbox"/>
Reports exist, but leadership doesn’t trust them	<input type="checkbox"/>
Admins hesitate to make changes because they’re unsure what’s connected	<input type="checkbox"/>
CRM feels “cluttered” with unused fields, reports, or objects	<input type="checkbox"/>
No clear owner for field changes, user training, or report logic	<input type="checkbox"/>

### Scoring Tip:

- 0-1 checks: You're in decent shape- just monitor closely
- 2-3 checks: Time for a cleanup and governance refresh
- 4+ checks: Your CRM is misaligned and likely affecting performance

## What to Audit– And Why It Matters

If your Salesforce CRM isn't working the way you need it to, the first step isn't rebuilding. It's auditing what's already there—and fixing what's getting in the way.

Focus your efforts on these five areas:

### 1. Configuration & Technical Debt

Start with visibility. Use Salesforce Optimizer and Setup Audit Trail to surface unused fields, broken automations, and cluttered objects that confuse users.

Cleaning up technical debt clears the path for smoother operations.

### 2. Report & Dashboard Alignment

Interview your leadership team. Are dashboards tracking the KPIs they actually use to make decisions?

If not, rebuild reports around real priorities, not assumptions. Visibility should drive action, not just look impressive.

### 3. User Experience

Audit how users experience Salesforce every day.

Simplify page layouts, clean up naming conventions, and remove duplicate or confusing fields.

A cleaner experience builds confidence and drives higher adoption.

### 4. Enablement & Adoption

Training needs to match how people actually work.

Skip passive Trailhead links. Offer live office hours, sandbox walkthroughs, and quick-start guides tailored to each role.

Hands-on support turns hesitant users into confident users.

## 5. Ownership & Governance

Long-term success starts with clear ownership.

Form a cross-functional team to oversee data hygiene, field changes, user requests, and CRM strategy.

Without governance, small problems snowball, and systems fall apart.

### **Next Steps: Get a CRM Health Audit from CUBE84**

Finished your self-check? Ready for expert eyes on your CRM setup?

CUBE84 specializes in post-implementation rescue and optimization.

We don't rebuild from scratch- we work with what you have and make it work better.

If you're seeing signs of CRM misalignment, let's talk.

We'll help you prioritize fixes, rebuild trust in the system, and create a roadmap that actually supports your business goals.

[Book a Free CRM Health Audit Call](#)