Nonprofit Salesforce Data Evaluation:

25 Questions for Cleaner, More Effective Data

HIGHER ROCK LLC
Solid Solutions, Elevated Impact

These are the **25 most important questions** you need to ask to ensure that your Salesforce CRM data is working for you, not against you. With over 20 years of Salesforce development, integration, optimization and management, the experts at Higher Rock LLC have curated these specific questions to help save you time, money, and headaches.

Data Entry and Validation

1. Do you know all the ways data is entered into your system?
2. Do you have ways to validate the data that comes from integrations?
3. Do you have validation rules that are aligned with ensuring data integrity?
4. Do you have clearly defined matching and duplicate rules?

Page Layout and User Interface

5. Do you have optimized page layouts to make viewing and entering data easy and efficient?
6. Do you utilize Dynamic Forms on Lightning Pages to properly filter out fields that are not applicable under certain conditions?
7. Do you have clearly defined help-text to allow users to know what fields are used for?
8. Do you have the proper order for buttons that are displayed on the page layouts?

Field Usage and Tracking

9. Do you know what fields are using field history tracking and if needed how to report on the history of field value changes?
10. Do you have a way to do a field audit on each object to see what data is being populated and what is not by your users?
11. Do you have clear parameters of what record type to use when, and are there record types that are no longer used?

Access Control and Security

12. Do you have a clear understanding of how field level security is set for each group?
13. Do you know who can see what records and why certain users can and cannot see certain data?
14. Do you utilize permission sets and permission set groups to manage user access to data?

Data Storage and Archive

15. Do you know which Salesforce apps are being used by your users?
16. Do you know the current storage usage for data and files?
17. Do you have an archive process to set aside data that has lost business value?

Reporting and KPIs

18. Do you have report types set up that are effective, simple, and easy to use?

19. Do you have reports and dashboards that give a clear picture of KPIs at a moment's notice?

20. Do you have customizable rollups established to properly measure donor metrics?

Task Management and Automation

21. Do you have clean tasks, or are automations overwhelming the task views?

Donor Engagement and Opportunity Management

22. Do you have proper levels and engagement plans established for organizing and communicating with your donors?

23. Do you have a clear distinction between leads and contacts and a standardized conversion process?

24. Do you use flags or alerts to identify activities with major donors?

25. Do you have clear opportunity staging to know how best to interact with a donor?

Answering these 25 questions will help you optimize your Salesforce CRM, streamline your daily data operations, and help you make better decisions with the data you have available.

At **Higher Rock LLC**, we partner with ministries and other nonprofit organizations to help them optimize their Salesfor CRM, gain greater access to information that supports effective real-time decision-making, and create custom integrations that save time and money while reducing the headaches of dealing with complex data.

Email us at admin@higherrock.us to schedule a **30-minute**, no-cost, no-obligation conversation and learn how we can help solve your biggest Salesforce challenges while saving you time and money!