



3 approaches to categorize and reduce technical debt

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#MHD24 #MILEHIGHDREAMIN



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20

30



Salesforce @scale dilemma

FORRESTER®

The complexity of scale crushes Salesforce's responsiveness.

As Salesforce use grows, innovation slows and flexibility evaporates.

Why? Every app change risks breaking one of hundreds of data and process customizations, integration links, and third-party add-ons.

The result: every change requires long and expensive impact-analysis and regression testing projects – killing the responsiveness that made Salesforce attractive at the start.



Salesforce @scale dilemma

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MILE HIGH DREAMIN'

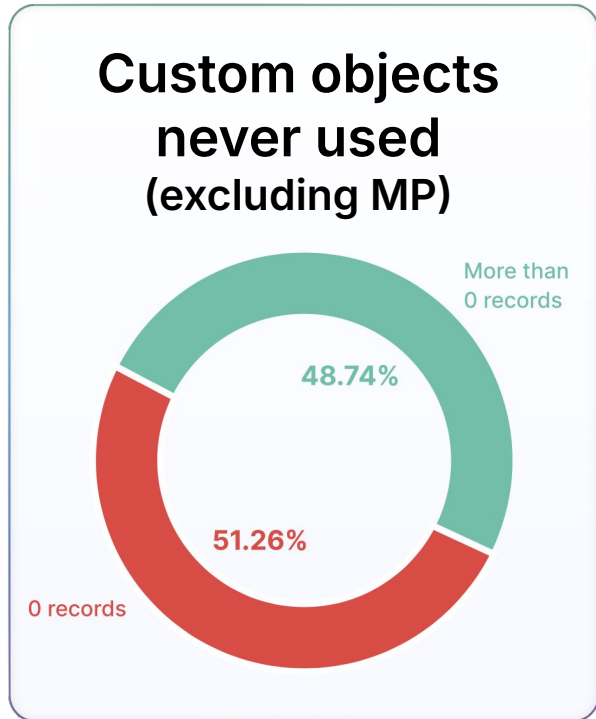
#MHD





Wasted effort

- Feedback
- Meetings
- Slack messages
- Development
- Testing deployment
- Documentation





Wasted effort

Feedback

Meetings

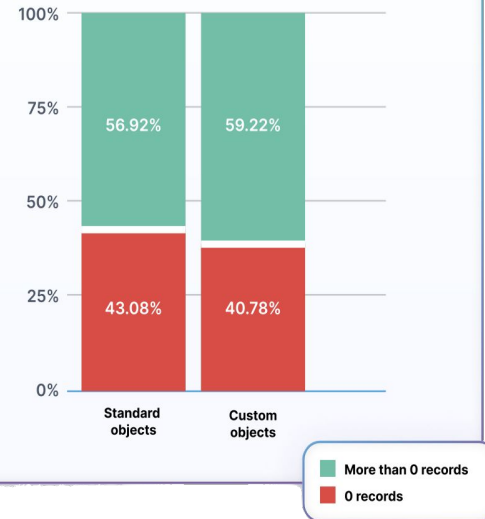
Slack messages

Development

Testing deployment

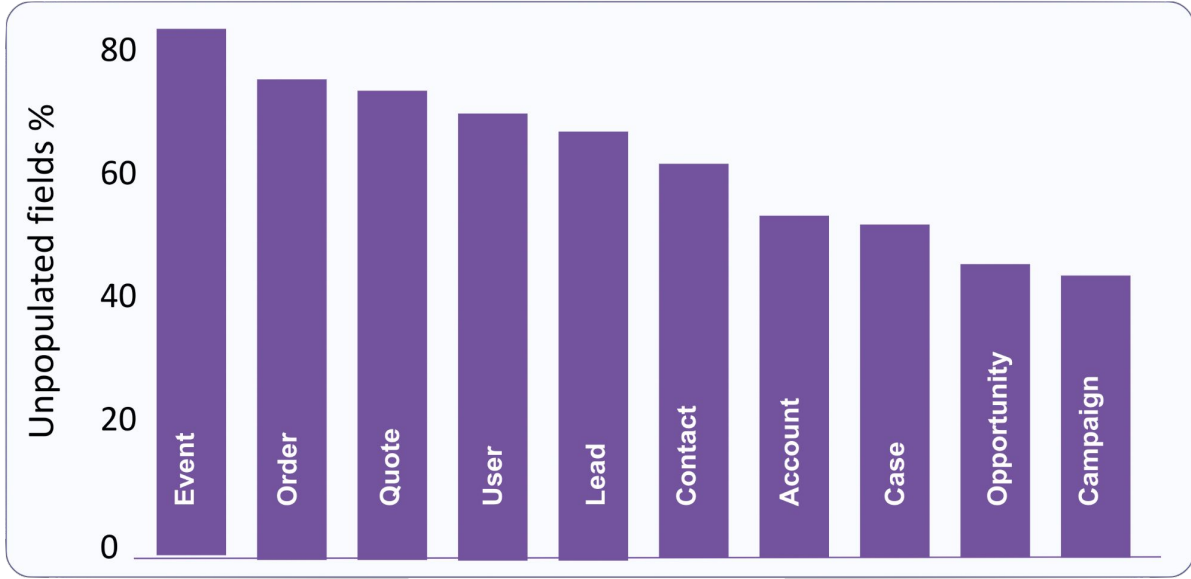
Documentation

Custom fields with 0% data (excluding MP)



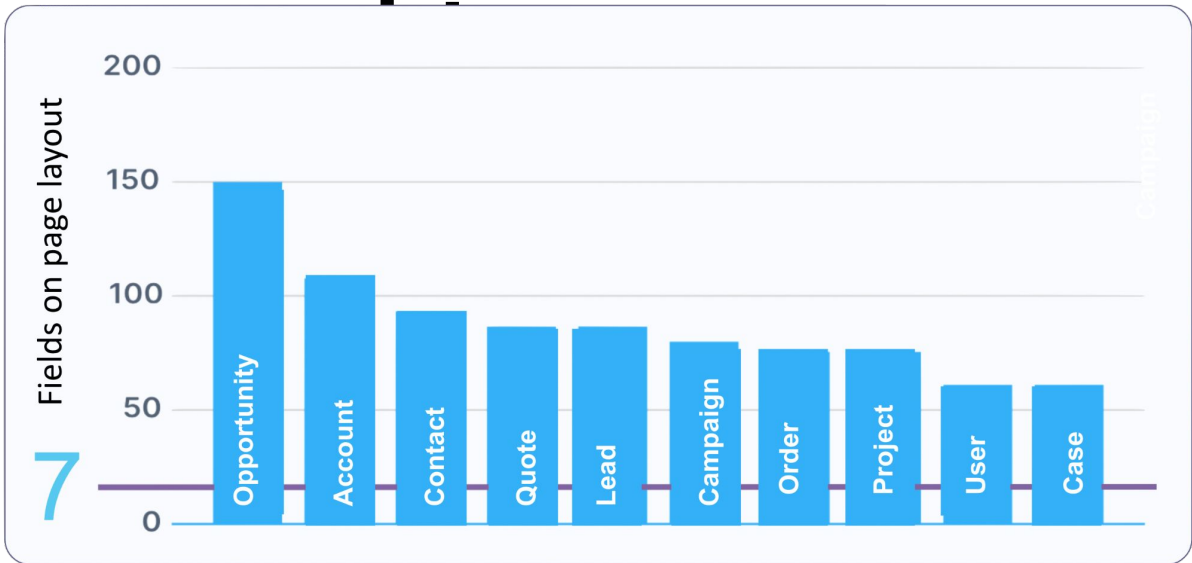


Far worse than 41%





Confused users. Poor





Change Intelligence Research Series

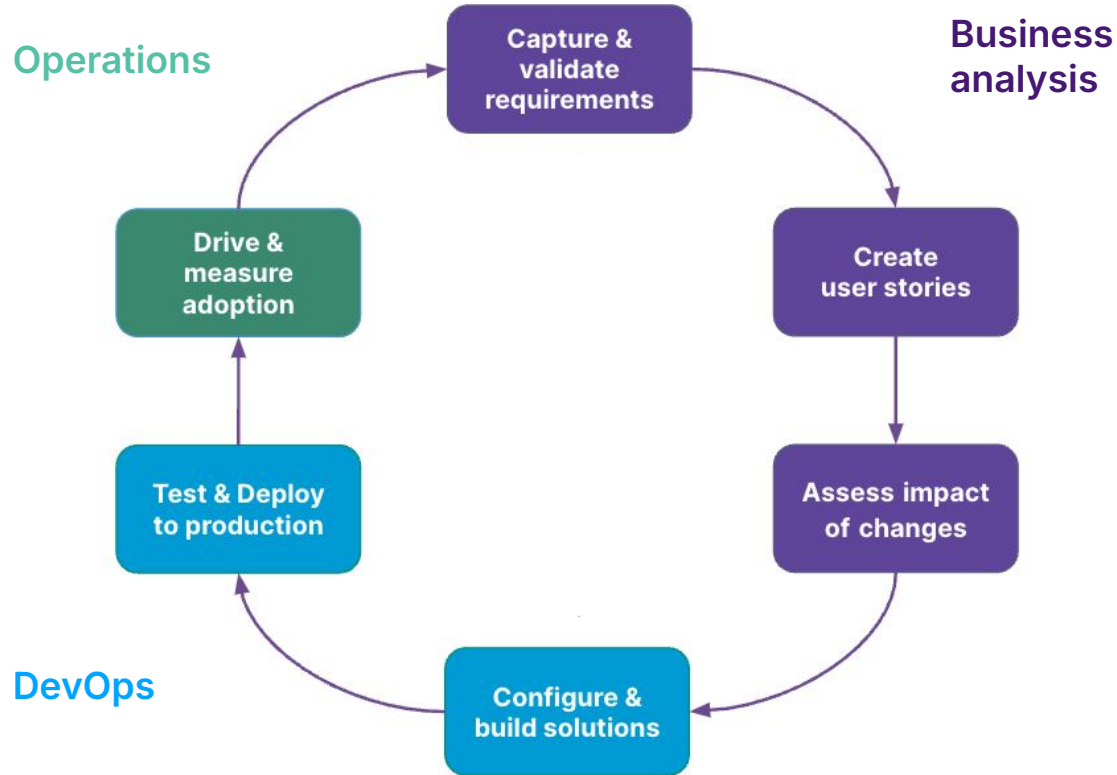
Data-driven insights
into the trends in
Salesforce configuration

[DOWNLOAD](#) reports

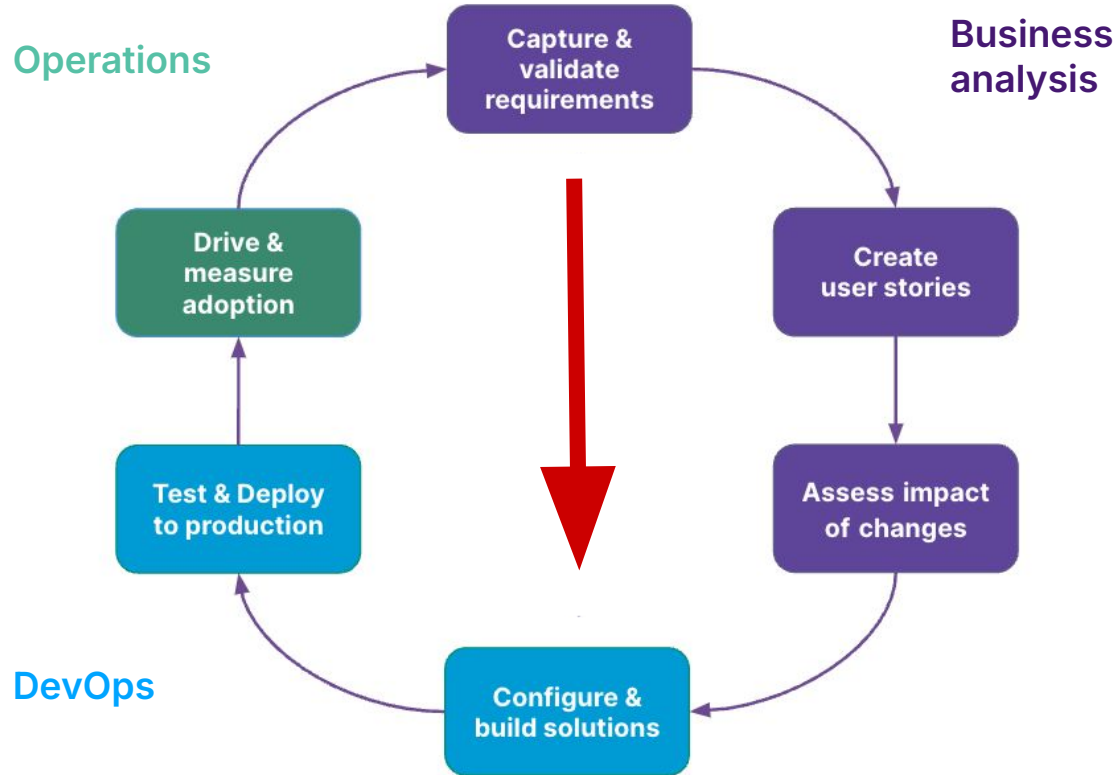




Implementation lifecycle



Tech debt machine



3 steps

3 demands



3 steps

Quantify debt

3 demands

Metadata dictionary



Metadata dictionary: impact



Data: Salesforce config ?
This is the config to our production Salesforce Org (Production)

Metadata views: **Select your view** | All types and Search by label or api | [Ask Org Copilot](#) | [Analytics 360](#)

Data: Salesforce config Last synced on: August 26, 2024 at 20:01

Name	Status	# of links	Data privacy	Opt
▶ Named Credentials		0		
▼ Objects		0		
▶ Custom Metadata		0		
▶ Custom Objects		0		
▶ External Objects		0		
▼ Standard Objects		0		
▶ Account		47		Un
▶ Account Contact Relationship		0		Un

Root nodes per page: 500 | 1 - 30 of 30

Owner ID | **Photo URL** | **Record Type ID** | **Website** | **Usage period** | **Billing Counr...** | **Employees** | **Annual Revenue** | **Industry** | **Account Phone** | **Google Drive U...**

0 25 50 75 100

[View all](#)

USED BY:

- Apex Classes (6)
- Apex Pages (7)
- Apex Triggers (2)
- Fields (45)

Metadata dictionary: dependency



Dependency tree
Root item: Stage

App [TREE VIEW] [GRID VIEW]

```
graph LR; FS((Field Stage)) --- AC[Apex Classes (1)]; FS --- C[Configuration - Celonis Make (2)]; FS --- ET[Email Templates (1)]; FS --- F[Fields (4)]; FS --- Flows((Flows (17))); FS --- GA[Global Actions (1)]; FS --- LP[Lightning Pages (1)]; FS --- LV[List Views (19)]; FS --- PL[Page Layouts (4)]; FS --- R[Reports (339)]; AC --- SC1((SC: Create Deferred Revenue...)); C --- SC2((SC: Create Deferred Revenue...)); ET --- AO[AutoOpptyCreate]; F --- CR[Create Renewal Opportunity]; F --- CO[Create Opportunity]; F --- MQ[MQL Opportunity Creation]; Flows --- MQL[Marketing Qualified to Nurture]; Flows --- NP[Nurture to Pipeline]; Flows --- OCL[Opportunity Closed Lost]; Flows --- OIR[Overdue Invoice Reminders]; Flows --- PAU[PB Account Type Updated on ...]; Flows --- POCW[PB Opportunity Closed Won ...]; GA --- COA[Create Opportunity From Account]; LP --- C[Lightning Pages]; LV --- COP[Create Opportunity From Partner]; LV --- COS[Create Opportunity From Space 2]; LV --- COU[Create Opportunity From Unlimi...];
```

1/2 >

1/2 >

USED BY:
Apex Classes (1)

% FILLED BY PICKLIST VALUE

Picklist Value	% Filled
Closed Won	~20%
Nurture	~15%
Closed Lost	~5%
Closed No oppo...	~2%
Neutral	~1%
BDR Qualified	~1%
Sales Engaged	~1%
Procurement	~1%
Preboarding	~1%
Business Case	~1%
Negative	~1%
Marketing Qual...	~1%
Suspended	~1%

3 steps

Quantify debt

Assess cost

3 demands

Metadata dictionary

Management support



Paying the price for tech debt



Technical debt has an interest rate

HIGH: Credit card interest: 29%

delays, surprises, rollbacks, performance

MEDIUM: Bank loan: 5%

future project risk, delays whilst refactor

LOW: Mortgage: 0.5%

if it ain't broke, don't fix it

3 steps

Quantify debt

Assess cost

Stop the bleeding

3 demands

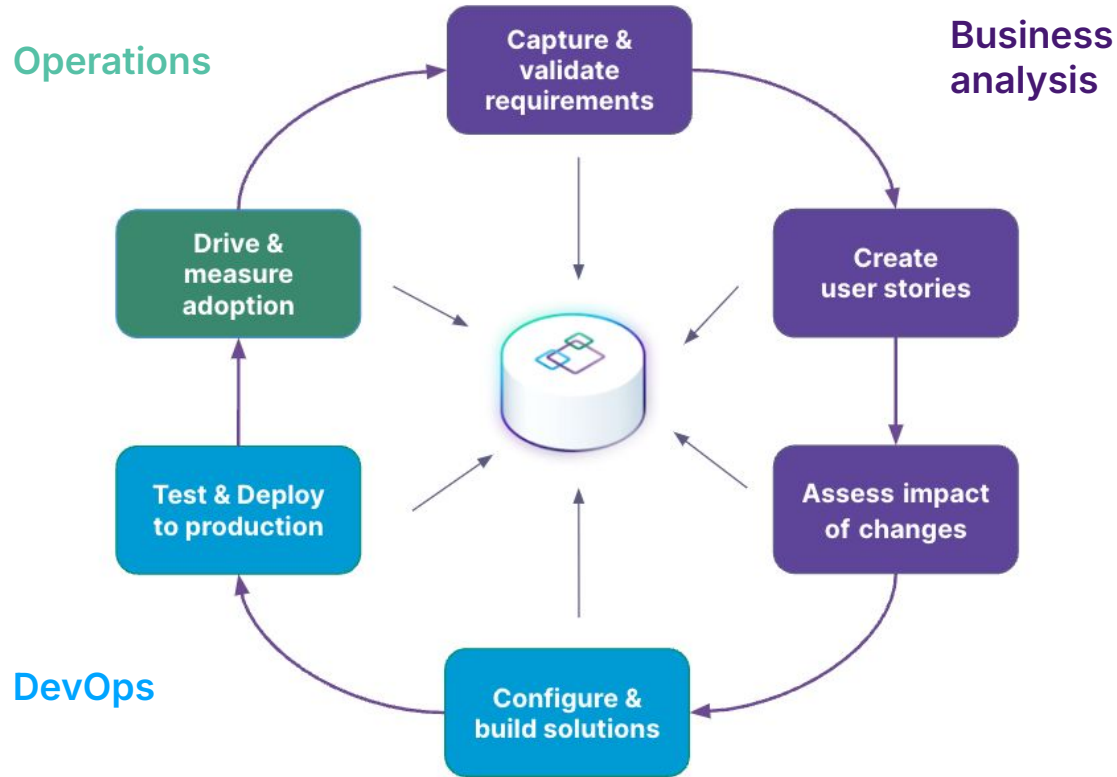
Metadata dictionary

Management support

Agree implementation
lifecycle



Implementation lifecycle



Resources

[Change Intelligence Research Series \(reports\)](#)

[Bosch video](#)

[What is metadata \(blog\)](#)

[Documenting metadata \(blog\)](#)

[Elements.cloud Metadata Explorer \(blog\)](#)

[Elements.cloud Permissions Explorer \(blog\)](#)

[AI Prompts to manage org health](#)

[Center of Excellence: Taylor Swift analogy \(blog\)](#)





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H
M **Thank you!** D

