

Salesforce Automation Audit

Platform: Salesforce | Type: Automation Audit | Prepared by: RevPal OpsPal

Executive Summary

| Component | Count |
|-----------------------------------|--|
| Apex Triggers | 130 (across 77 objects) |
| Active Flows | 88 |
| Inactive/Obsolete Flows | 373 |
| Workflow Rules (Process Builders) | 15 active (Workflow type) |
| Validation Rules | 65 active |
| Standard Assignment Rules | 0 (intentionally removed) |
| Custom Routing Objects | 3 (Assignment Queue, Risk Assignment Queue, Round Robin) |
| Installed Packages | 44 |

Key Findings

1. **Custom Assignment Queue system is the primary lead/contact routing mechanism** -- not standard SFDC Assignment Rules. Three custom objects (`Assignment_Queue__c` , `Risk_Assignment_Queue__c` , `Round_Robin__c`) with dedicated Flows handle all routing.
2. **Lead object is the highest-risk automation surface** -- 8 Apex triggers (all managed packages) + 18 active Flows + field updates from Marketo sync create a complex execution chain.
3. **Contact is the most heavily automated object** -- 12 triggers + 25 flows, highest conflict potential in the org.
4. **Round Robin Assignee records are completely stale** -- last assigned dates are from 2022, all 19 records reference former employees (Greg Gomez, Julia Fitzgerald, etc.). This system appears abandoned.
5. **Zero custom Apex triggers** on Lead or Contact -- all 20 triggers across these objects are from managed packages (LeanData, ZoomInfo, Cloudingo, Groove, Slack, etc.).

Custom Lead Assignment Architecture (CRITICAL DISCOVERY)

Enterprise Software Co built a **three-tier custom routing system** that replaces standard SFDC Lead Assignment Rules:

Tier 1: Assignment Queue (Lead/Contact Routing)

Object: `Assignment_Queue__c` **Purpose:** Maps AEs to sales segments for lead and contact round-robin assignment

| Field | Type | Purpose |
|---------------------------------------|------------------------|---|
| Name | Auto Number (AS-XXXXX) | Record identifier |
| Queue_Name__c | Picklist | Sales segment: SMB, MM, ENT, Agency |
| Queue_Member__c | Lookup(User) | The AE assigned to this queue |
| Total_Number_of_Lead_Assignment__c | Number | Counter: leads assigned to this member |
| Total_Number_of_Contact_Assignment__c | Number | Counter: contacts assigned to this member |

Active Records (18):

| Queue | AEs |
|--------------------|--|
| SMB (8 members) | Sales Rep A, Sales Rep B, Sales Rep C, Sales Rep D, Sales Rep E, Madison Doyle, William Padilla, Sales Rep F |
| MM (6 members) | Sales Rep A, Sales Rep B, Sales Rep C, Sales Rep D, William Padilla, Sales Rep F |
| ENT (2 members) | Sales Rep C, Shawn Silverstein |
| Agency (2 members) | Sales Rep E, Shawn Silverstein |

Counter Status: Nearly all counters are at 0. Only Sales Rep A has 1 lead assignment in SMB. This suggests the Flow-based routing is either newly implemented, recently reset, or not actively being triggered.

Tier 2: Risk Assignment Queue (Account/CS Routing)

Object: Risk_Assignment_Queue__c **Purpose:** Routes at-risk accounts to CS reps

| Field | Type | Purpose |
|--------------------------------------|---------------------------|----------------------------|
| Name | Auto Number (RAQ-XXXXXXX) | Record identifier |
| Queue_Member__c | Lookup(User) | CS rep assigned |
| Total_Number_of_Assigned_Accounts__c | Number | Counter: accounts assigned |

Active Records (4): 4 CS reps, all with 0 assigned accounts.

Tier 3: Round Robin (LEGACY - Abandoned)

Object: Round_Robin__c (parent) / Round_Robin_Assignee__c (child) **Purpose:** Original UserGems-based round robin from 2022

Round Robin Groups: UserGems - Tier A, UserGems - SDR, UserGems - Tier B, UserGems - Tier C **Status:** STALE. All 19 assignee records reference former employees. Last assigned dates range from April-June 2022. **Recommendation:** Archive or delete. This system is completely non-functional.

Controlling Flows

| Flow | Type | Purpose |
|---|--------------------------|--|
| Lead_Assign_Queue_Member_as_Lead_Owner | AutoLaunched | Primary lead router -- reads Assignment_Queue__c field on Lead, looks up matching Assignment Queue record, assigns Lead owner to the Queue Member |
| Contact_Assign_Queue_Member_as_Contact_Owner | AutoLaunched | Primary contact router -- same logic for Contacts |
| Account_Assign_Risk_Queue_Member_as_Support_Rep | AutoLaunched | Routes at-risk accounts via Risk Assignment Queue |
| Assigned_Queue_Update_Member_Counter_Daily_Flow | AutoLaunched (Scheduled) | Daily maintenance -- updates assignment counters on Assignment Queue records |
| Risk_Assignment_Queue_Update_Counter_Daily_Flow | AutoLaunched (Scheduled) | Daily maintenance -- updates counters on Risk Assignment Queue records |

How It Works

1. Marketo Campaign 6147 Step 4 sets Assignment_Queue__c picklist value on Lead (SMB, MM, ENT, or Agency)
- |
2. Lead syncs to SFDC via Marketo connector
- |
3. Record-triggered Flow "Lead- Assign Queue Member as Lead Owner" fires
- |
4. Flow queries Assignment_Queue__c custom object records WHERE Queue_Name__c = {Lead's Assignment_Queue__c value}
- |
5. Flow selects the next Queue Member (round-robin logic) and updates Lead OwnerId
- |
6. Daily scheduled Flow updates assignment counters

Why The Routing Chain Is Broken

The disconnect is at **Step 2**. Marketo Campaign 6147 Step 5 uses "Sync Person to SFDC **with Auto-Assignment Rules**" -- this invokes standard SFDC Assignment Rules (which don't exist) instead of simply syncing the lead and letting the custom Flow fire on record change. The fix is to change Step 5 to a standard sync without the assignment rules flag, so the lead arrives in SFDC with the `Assignment_Queue__c` field already set, and the Flow handles routing.

Automation Inventory by Object

Lead Object (HIGH RISK)

8 Apex Triggers (all managed packages):

| Trigger | Package | Events |
|----------------------------------|--------------------------|-----------------------------|
| LeadTrigger | ZoomInfo (DOZISF) | BI, AI, BU, AU, BD, AD, AUn |
| lead | Slack (slackv2) | BI, AI, BU, AU, BD, AD, AUn |
| BeforeLeadInsert | LeanData | BI |
| BeforeLeadUpdate | LeanData | BU |
| ContinuousCleanLeadTrigger | LeanData | AI |
| ContinuousCleanLeadUpdateTrigger | LeanData | AU |
| LeadUpdatePOSyncTrigger | Cloudingo | AU |
| normalizeLeadPhone | Groove (DaScoopComposer) | BI, BU |

18 Active Flows touching Lead:

| Flow | Type | Purpose |
|--|--------------|----------------------------|
| Lead - Before Save (On Edit) | AutoLaunched | Pre-save field updates |
| Lead - Assign Queue Member as Lead Owner | AutoLaunched | Custom routing |
| Lead - On Edit - LSA or Status Changed | AutoLaunched | Status/LSA change handler |
| Lead - Update Lead Owner When Status Changes From Recycle to MQL | AutoLaunched | MQL recycle handler |
| Lead - Enrich Lead | AutoLaunched | Data enrichment |
| Lead - Convert to Existing Contact with Same Email | AutoLaunched | Dedup/merge on convert |
| Lead - Add Converted Contact to Campaigns (x2) | AutoLaunched | Post-convert campaign sync |
| Lead - Update Account Owner Name | AutoLaunched | Account matching |
| Lead - Update MQL Visited Field | AutoLaunched | MQL tracking |
| Lead - Update Related Campaign Member | AutoLaunched | Campaign member sync |
| Lead - Update Website Field | AutoLaunched | Field enrichment |
| Lead - Use ZI Field Values | AutoLaunched | ZoomInfo field mapping |
| Campaign Member - Update Fields from Related Lead/Contact | AutoLaunched | Cross-object sync |
| Event - Update Event Calendly Flag on Related Lead | AutoLaunched | Calendly event tracking |
| Lead.SD_Tracking = True | Workflow | Tracking flag |
| New Lead Created or Edited, Get Copy of Sequence | Workflow | Groove sequence sync |

| | | |
|-------------------|----------|-----------------|
| SD - Convert Lead | Workflow | Lead conversion |
|-------------------|----------|-----------------|

Lead Fields for Routing:

- `Assignment_Queue__c` (Picklist) -- values: SMB, MM, ENT, Agency
- `Distro_Assigned_CP__c` (Checkbox) -- CP distribution flag

Conflict Risk Score: 72 (HIGH)

- 8 triggers from 5 packages (25 pts)
- 18 active flows (30 pts)
- Mixed trigger + flow automation (20 pts)
- Critical routing dependency (bonus)

Contact Object (HIGHEST RISK)

12 Apex Triggers (all managed packages):

| Trigger | Package |
|--------------------------------------|-----------------------|
| ContactTrigger | ZoomInfo, Ordway, LID |
| contact | Slack |
| ContactBeforeInsertTrigger | LeanData |
| ContinuousCleanContactTrigger/Update | LeanData |
| ContactUpdatePOSyncTrigger | Cloudingo |
| normalizeContactPhone | Groove |
| LH_Contact | Lookup Helper |
| PS_Contact/Describe_Async | RH2 |

25 Active Flows touching Contact

Contact Fields for Routing:

- `Assignment_Queue__c` (Picklist) -- same as Lead
- `Round_Robin_ID__c` (Formula Number) -- legacy
- `Round_Robin_Date_Time__c` (DateTime) -- legacy
- `Distro_Assigned_CP__c` (Checkbox) -- CP distribution flag

Conflict Risk Score: 85 (CRITICAL)

- 12 triggers from 9 packages (30 pts)
- 25 active flows (30 pts)
- Mixed trigger + flow automation (20 pts)
- Governor limit risk at scale (5 pts)

Account Object (MEDIUM-HIGH RISK)

- 11 Apex Triggers (all managed packages)
- 11 Active Flows
- Risk Assignment Queue routing
- Conflict Risk Score: 58 (MEDIUM)

Opportunity Object (MEDIUM RISK)

- 6 Apex Triggers (5 managed + 1 custom `RHX_Opportunity`)
- 20 Active Flows (highest flow count)
- Conflict Risk Score: 52 (MEDIUM)

Workflow Rules / Process Builders

15 active Workflow-type flows detected. These are legacy Process Builders that should be migrated to Record-Triggered Flows:

| Name | Target |
|---|------------------------|
| Assigned Badge Notification | Trailhead |
| Campaign Member Logic | CampaignMember |
| Event Flow | Event |
| Insight from Salesloft | Opportunity |
| Lead.SD_Tracking = True | Lead |
| MAS: Mass Action Configuration | Mass Action |
| New Lead/Contact Created - Get Copy of Sequence | Lead/Contact |
| Opportunity - Edit | Opportunity |
| Populate External Id | Trailhead |
| Populate UserTrailmix External Id | Trailhead |
| Populate Primary Contact Opp Field | OpportunityContactRole |
| SD - Convert Lead | Lead |
| SD - Set First Alert | Signals |
| Task Flow | Task |
| Task to Opportunity | Task |

Migration Priority: Lead-related workflows (SD_Tracking, Convert Lead, Get Copy of Sequence) should be migrated first to reduce execution order complexity on the Lead object.

Validation Rules (65 Active)

65 active validation rules across the org. Full list available in [data/validation_rules.json](#).

Conflict Detection

Critical Conflict Zones

1. Lead Owner Changes (CRITICAL)

Multiple automations compete to set Lead Owner:

- `Lead_Assign_Queue_Member_as_Lead_Owner` (custom routing Flow)
- `Lead_Update_Lead_Owner_When_Status_Changes_From_Recycle_to_MQL` (MQL recycle Flow)
- LeanData triggers (BeforeLeadInsert, BeforeLeadUpdate)
- Marketo sync (sets `sfdcLeadOwnerId` directly)

Risk: Owner could be set by Marketo, then overwritten by LeanData trigger, then overwritten again by the Assignment Queue Flow in the same transaction.

2. Contact Owner Changes (CRITICAL)

Same pattern as Lead:

- `Contact_Assign_Queue_Member_as_Contact_Owner` (custom routing Flow)
- `Contact_Update_Contact_Owner_When_Status_Changes_From_Recycle_to_MQL` (MQL recycle Flow)
- LeanData triggers
- Marketo sync

3. Lead Before Save Conflicts (HIGH)

- `Lead_Before_Save_On_Edit` (Flow)
- `normalizeLeadPhone` (Groove trigger - BI, BU)
- `BeforeLeadInsert` / `BeforeLeadUpdate` (LeanData triggers)

All fire on before-save events. Execution order is non-deterministic for triggers from different packages.

4. Account Owner vs Support Rep (MEDIUM)

- `Account_Assign_Risk_Queue_Member_as_Support_Rep` (Risk Queue Flow)
- `Opportunity_On_Create_Update_Account_Owner_to_Opp_Owner` (Opp create Flow)
- Both modify Account fields in response to different events

Recommendations

Immediate (P0)

1. **Fix Marketo Campaign 6147 Step 5** -- Change from "Sync Person to SFDC with Auto-Assignment Rules" to a standard sync. The `Assignment_Queue__c` field is already set by Step 4. The custom Flow (`Lead_Assign_Queue_Member_as_Lead_Owner`) will fire automatically when the Lead record is created/updated in SFDC with the queue value populated.
2. **Verify Assignment Queue Flow trigger conditions** -- Confirm `Lead_Assign_Queue_Member_as_Lead_Owner` fires on insert (not just update). If it only fires on update, new leads synced from Marketo won't get routed on initial creation.
3. **Investigate near-zero assignment counters** -- 17 of 18 Assignment Queue records show 0 lead/contact assignments. Either the counters are broken, recently reset, or the Flow routing isn't firing as expected.

Short-Term (P1)

4. **Decommission Round Robin system** -- All 19 `Round_Robin_Assignee__c` records reference former employees from 2022. The `Round_Robin__c` parent object (4 UserGems records) is also stale. Archive and remove.
5. **Investigate LeanData trigger execution** -- LeanData has 4 triggers on Lead that fire on insert/update. Determine if they conflict with the custom Assignment Queue Flow for ownership changes.
6. **Migrate Process Builders** -- 15 Workflow-type automations remain. Prioritize the 3 Lead-related ones to reduce execution complexity.

Long-Term (P2)

7. **Consolidate Lead before-save logic** -- Multiple triggers and flows fire on Lead before-save. Consider consolidating into a single orchestrated before-save Flow.
8. **Document Flow execution order** -- With 18 flows on Lead and 25 on Contact, execution order dependencies should be explicitly documented and tested.
9. **Audit inactive flows** -- 373 inactive/obsolete flow versions exist. Clean up to reduce metadata clutter.

Data Files

| File | Description |
|--|---------------------------------|
| <code>data/apex_triggers.json</code> | All 130 active Apex triggers |
| <code>data/active_flows_tooling.json</code> | All 88 active flows |
| <code>data/inactive_flows.json</code> | 373 inactive/obsolete flows |
| <code>data/validation_rules.json</code> | 65 active validation rules |
| <code>data/workflow_rules.json</code> | 101 workflow rules |
| <code>data/assignment_queue_records.json</code> | 18 Assignment Queue records |
| <code>data/risk_assignment_queue_records.json</code> | 4 Risk Assignment Queue records |
| <code>data/round_robin_assignees.json</code> | 19 Round Robin Assignee records |

Generated: 2026-02-12 | RevPal OpsPal Automation Audit Framework