Field Trip Analysis

AVAILABLE AS STANDALONE OR PART OF
Security + Access Manager Suite

CUSTOMER SUCCESS STORY

Turning field sprawl into a governed Salesforce data model

A global manufacturing organisation had spent more than eight years expanding its Salesforce environment. What began as a relatively simple CRM had evolved into a complex data model containing thousands of standard and custom fields across sales, service and operations.

Overview

As the organisation's Salesforce environment grew, new fields were continually introduced to support changing business processes, integrations, reporting requirements and regional teams.

The problem was that fields were being added far more frequently than they were being reviewed.

Over time, the Salesforce team lost confidence in which fields were still actively used, which were relevant only to particular business processes, and which could safely be retired.

Their existing field-cleanup process relied on spreadsheets, manual queries and individual investigation of dependencies. Reviewing even a single core object could consume days of administrator time.

The team needed a faster and more reliable way to understand field usage, improve data quality and reduce technical debt without introducing unnecessary risk.

The challenge they needed to solve



3,240
Fields to Assess

An initial review of the Salesforce environment showed just how difficult manual rationalisation had become.

Across the first five objects selected for review, the organisation also carried hundreds of fields with unclear ownership or business purpose.

What the team did not know was which of those fields could actually be removed. A field could appear unused while still supporting automation, reporting, security configurations or a specialist Record Type.

That distinction made manual cleanup slow and risky.

THE MANDATE

01 ▸ **Identify** empty and low-use fields across the organisation's most important Salesforce objects

02 ▸ **Understand** whether low-use fields were still important to individual Record Types or business processes

03 ▸ **Replace** manual spreadsheet-based field analysis with a repeatable process

04 ▸ **Assess** page-layout, security and dependency exposure before removing fields

05 ▸ **Reduce** the risk of breaking Flows, reports, automation or other Salesforce components during cleanup

06 ▸ **Establish** an ongoing field-governance process instead of relying on occasional one-off cleanup projects

How Field Trip Analysis helped solve the issue

The Salesforce team began by using Field Trip Analysis to review its highest-priority objects.

Instead of manually assembling information from multiple areas of Salesforce, the team was able to bring field usage and supporting context into one structured analysis.

The system surfaced

- Fields with **0% population**
- Fields with **very low population**
- Exact numbers of records containing values
- Fields used heavily by individual **Record Types**
- Fields present or missing across relevant **page layouts**
- Profile and Permission Set exposure
- Dependencies across **Flows, automation, code, reports, dashboards and UI components**
- Automated **Keep, Review and Remove** recommendations
- Numerical **deletion-risk scores** for potential cleanup candidates

One field, two very different insights

One finding demonstrated **why the team needed more than population analysis alone.** A custom Opportunity field was populated on only 2.9% of records, making it appear to be an obvious retirement candidate.

SEEN ACROSS ALL RECORDS

2.9%

Population alone marked the field as an obvious candidate for removal.

SEEN WITHIN ONE RECORD TYPE

81%

Segment analysis showed the same field carrying a specialist Opportunity Record Type.

FURTHER INVESTIGATION IDENTIFIED

- **Two active Flows**
- **Seven reports**
- **Three page layouts**
- **Profile and permission assignments**

POPULATION / CONTEXT / RISK

From	To
"Is this field empty?"	*"Does this field still provide value, and what would happen if we removed it?"*

OUTCOME

The field was retained.

Without the additional context, the team could easily have removed a field that remained critical to an active business process.

Field Trip Analysis

The outcome

FIRST PHASE RESULTS

3,240 fields analysed across priority Salesforce objects

583 completely unused fields identified

454 additional low-use fields surfaced for review

217 fields approved for retirement after business and technical validation

96 low-use fields retained once segment usage or dependencies were identified

- Manual field-review effort reduced by ~70%
- A repeatable quarterly field-governance process established using templates and scheduled analysis

ROI & Operational Impact

The team estimated that its previous approach required around 120 administrator hours per quarterly field review once exports, spreadsheet analysis, dependency investigation and stakeholder validation were considered.

With FTA providing the underlying evidence automatically, **the same governance process required approximately 35 hours**, focused primarily on reviewing findings and making business decisions.

Across four review cycles, this represented more than 340 hours of administrative capacity returned to the Salesforce team each year.

At an estimated blended resource cost of £80 per hour, this equated to approximately £27,000 in annual operational value, before considering the longer-term benefit of reduced technical debt.

70%
Reduction in manual analysis effort

217
Fields approved for retirement

340+
Admin hours saved annually

£27k
Estimated annual operational value

Why this exceeded expectations

The Salesforce team expected Field Trip Analysis to help identify empty fields.

They gained a structured way to understand how their Salesforce data model was actually being used.

They expected a field-cleanup tool.

They gained visibility across population, Record Types, layouts, permissions and dependencies, enabling the team to make field-retirement decisions with significantly greater confidence.

And instead of completing another one-off cleanup exercise, they established a repeatable governance process for continually controlling field sprawl as Salesforce evolved.

> "Before Field Trip Analysis, identifying an empty field was the easy part. Understanding whether we could safely remove it was where the real work began. We can now see the evidence we need in one place and focus our time on making decisions rather than building spreadsheets."

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