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SALESFORCE SALES AND SERVICE CLOUD

Technical Debt   
Reduction Policy

**A NOTE FROM CLOUDKETTLE:**

In today’s data-rich world, managing technical debt in Salesforce is a challenge   
almost all enterprises face. Steep technical debt in Sales and Service Cloud affects Salesforce performance, the accuracy of data, and the reliability of Salesforce processes. If you’re looking for more information on technical debt and why it’s a problem, check out our blog post [How to Manage Technical Debt in Salesforce](https://bit.ly/techdebtsf).

Having a technical debt reduction policy is a necessary component for decreasing technical debt and improving data integrity. This template was built for enterprise teams and should be populated with your organization’s relevant information in the highlighted areas.

**Once the policy is completed, remember to delete the grey note boxes throughout and update the Table of Contents.**

Salesforce Sales and Service Cloud Technical Debt Reduction Policy

**Organization:** insert company name  
**Org ID:** insert OrgID

**Policy:** Salesforce Sales and Service Cloud Technical Debt Reduction Policy

**Effective Date:** insert date

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Revision** | **Rev. Date** | **Description** | **Prepared By** | **Approved By** | **Approved Date** |
| **1** |  |  |  |  |  |
| **2** |  |  |  |  |  |

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# Purpose

**NOTE:**

While a small amount of technical debt is normal, a Salesforce org that contains too much technical debt is brittle, can have performance issues for stakeholders and is expensive to maintain. As Salesforce orgs age and the companies they service grow in complexity, technical debt accumulates.

This policy exists to ensure the ongoing improvement and continuity of the insert company name Sales and Service Cloud org insert OrgID (referred to as Salesforce in the remainder of this document). Insert company name team members, partners and users depend on Salesforce for proper delivery of service.

The goal of this policy is to mandate guidelines for Salesforce technical debt reduction to ensure the health of the org improves over time. Doing so not only improves the stability of the org, but reduces the ongoing cost and time required to make feature improvements in the future.

# Scope

The policy refers to the architecture, processes and data of the Salesforce org insert OrgID.

This policy may impact, but does not extend to cover integrated solutions, including the insert company name insert list of integrated solutions.

## Application to Parties

This policy applies to all insert company name officers, leadership team members who direct the priority of tasks to be undertaken by the Salesforce team, the insert company name insert who will oversee this and members of the insert company name Salesforce team.

# Administration

This policy is administered by the insert company name insert title for who will oversee policy and managed on a day to day basis by the insert name of who will manage this on a day to day basis.

# Policy

## Team Level Leadership

Insert company name will provide one internal member of the Salesforce team to lead debt reduction (Debt Reduction Project Lead) activities. While this person may have other responsibilities, the reduction of technical debt will be the most important metric outlined in their insert what your annual measurement program (OKR, V2MOM etc.) is.

## Documentation of Technical Debt

**NOTE:**

In order to facilitate this, there needs to be a ticket or case type of “Technical Debt” in your project management solution (Jira, Quip, Salesforce Cases).

As a normal course of their everyday work, insert company name Salesforce team members will discover technical debt. All Salesforce team members will log these newly discovered items in insert platform like Jira, Quip, Salesforce Cases under the ticket type Technical Debt and classify them as insert type of Technical Debt ticket. These will also include rough estimations of the level of work required to remediate the debt and the cost of the debt in terms of how it slows development work or otherwise impacts the health of the org.

### Debt Classifications\*

Technical Debt will be classified as either Incurred or Evolved and where appropriate, also categorized as Long Term Strategic Debt.

* **Incurred technical debt.** Technical debt that is deliberately or inadvertently incurred. Examples of this would be the use of an obsolete method of solving a problem (for example, using a new workflow when adding an item to an existing process would be better) or utilization of a feature of Salesforce that is on the roadmap to be retired.
* **Evolved technical debt**. This is technical debt that is created over time as the result of changes both in Salesforce’s platform and insert company name’s Salesforce org. For example, a suitable solution for automating a system may have worked in 2016, but since then, the massive growth in the amount of contacts in insert company name’s org make that solution problematic. Alternatively, a Salesforce release, or feature being retired may mean a solution needs to be reworked.

\*Source: Managing Technical Debt: Nine Policy Recommendations <https://bit.ly/9tdrr>

#### Long Term Strategic Technical Debt

Insert company name recognizes a special category of debt, which is Long Term Strategic Technical Debt. This debt cannot be solved in a single sprint and is the type that has significant ongoing impact on the Salesforce org. This type of debt also has significant implications for allocations of budget and resources in order to achieve remediation.

Outstanding Technical Debt tickets in insert platform like Jira, Quip, Salesforce Cases classified as Long Term Strategic Debt will be reviewed and prioritized during fiscal budget planning by the insert company name and who will be in charge on an annual basis.

## Debt Reduction Mandate

**NOTE:**

Because Salesforce orgs are generally always growing in the amount of code and complexity, it is not advisable to stipulate a percentage of code to be reduced and quantifying a percentage or amount of debt to be reduced as a quota is not useful.

Insert company name will dedicate one week-long sprint every two months to debt reduction. This sprint will include all Salesforce team members and consist of a pre-prioritized list of debt reduction items from insert platform like Jira, Quip, Salesforce Cases. These sprints will be documented in insert platform like Jira, Quip, Salesforce Cases and specifically labelled as “Debt Reduction”.

### The Decision to Knowingly Incur Technical Debt

**NOTE:**

In some cases, a business decision may be made to knowingly incur technical debt in order to launch a feature or requirement in production.

Prior to deliberately incurring technical debt, the insert company name team this requirement is benefiting will be advised of the cost of remediating this future incurred debt and that remediation will be prioritized over other feature enhancements in the next sprint(s). The insert company name insert leader title and leader of the team seeking the feature enhancements shall negotiate a mutually agreeable budget and schedule for that work, including a plan for retiring any technical debt incurred.

It is insert company name’s policy that Deliberately Incurred Technical Debt (as determined by a member of the Salesforce team) becomes a top development priority in all future sprints until it is remediated.

In the event that the Salesforce team itself is unable to agree on whether an item of debt is Incurred or Evolved, the final decision will be made by the insert leader title.

## Data Reduction’s Role in Debt Reduction

**NOTE:**

In orgs, the retention of data that is no longer useful can be a liability and slow debt reduction efforts.

When legacy data is removed, the reduction of fields and associated processes, workflows and other items becomes easier. In following the insert company name Data Retention and Destruction Policy for Sales and Service Cloud, insert company name will make debt reduction a simpler process moving forward.

# Updates

This policy will be reviewed and updated at a minimum, on an annual basis by the insert company name Salesforce team.

# Exception Requests

Insert reference to company name policy on this.

# Approved Exceptions

|  |  |  |  |
| --- | --- | --- | --- |
| **Exception Item** | **Requested By** | **Approved By** | **Approved Date** |
|  |  |  |  |
|  |  |  |  |

**FINAL THOUGHTS FROM CLOUDKETTLE:**

We hope this template provided your team with the outline and critical elements   
to create your own Salesforce Sales and Service Cloud technical debt reduction policy. If you have any questions about this template or Salesforce Sales and Service Cloud optimization, reach out today.

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We love helping enterprise organizations transform Salesforce to drive revenue.

