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MS - March 2026 Newsletter

As Salesforce environments scale, expectations rise alongside them — stronger governance, more disciplined automation, and measurable AI outcomes. This month we're focusing on three themes we're actively addressing across client orgs: security architecture, automation modernization, and AI readiness.

⚙️ Ecosystem Watch: Security & Scale

Designing for Least Privilege

As organizations mature, access tends to accumulate rather than staying intentional. We frequently see overlapping permission sets, profile-heavy architectures, and admin access granted as a shortcut. Over time, this creates unnecessary exposure and audit risk.

Our recommendation is to move toward a true Least Privilege model: align access tightly to job function, eliminate redundant permissions, and shift to a permission-set-driven design that is easier to govern and scale. A robust security posture is critical, moving beyond mere system configuration concern to directly influence both compliance readiness and the reliability of AI-enabled workflows.

Automation: Reducing Layering Risk

Many Salesforce orgs still operate with Workflow Rules, Process Builder, and Flow running in parallel. While functional, this layered approach increases regression risk, complicates deployments, and quietly builds technical debt.

Modernization doesn't require disruption, but it does require structure. We advise clients to inventory existing automation, consolidate duplicate logic, refactor into modular Flows, validate thoroughly in sandbox, and document standards moving forward. Cleaner automation translates directly into safer releases and faster change velocity.

Agentforce Readiness: Data Before Deployment

Agentforce introduces powerful capabilities – AI agents can qualify leads, resolve cases, and assist customers autonomously. However, success depends far more on data readiness than prompt design. Industry research shows that fewer than one in five organizations are truly prepared for AI from a data standpoint, and that gap matters, because AI doesn't just use your data; it amplifies it. Poor-quality, biased, or outdated inputs can turn small inaccuracies into flawed predictions, automated mistakes, and real operational failures.

Before deploying AI agents, organizations should pressure-test five areas: data hygiene, governance, security controls, knowledge quality, and monitoring. Deduplicate records and ensure key fields are complete. Define data ownership and validation standards early. Use field-level security and the Trust Layer to ensure agents

only access what they should. Keep knowledge articles current and reliable, as agents ground their responses in that content. Finally, test in a sandbox and monitor performance over time – AI is not "set it and forget it."

The most effective approach is to start small: one focused use case, one clean dataset, and one measurable outcome. Prove value first, then scale responsibly. If you'd like support identifying the right starting point, or validating your foundation, let's connect to walk through Agentforce and discuss an Agentforce Data Readiness Review to assess data quality, governance, and security.

🎙️Cirrius Talk: Featured Content

Recent Episodes: AI Episode | Salesforce at Scale

In our latest episodes, we explore what scalable AI governance looks like in real Salesforce environments, how architecture decisions impact long-term AI success, and lessons learned from enterprise-scale implementations.

🎧 Episodes are available via Apple Podcasts & Spotify for those interested in exploring these conversations.

🗺️ Planning & Stewardship Focus

As you look toward Q2, consider whether your security model is intentionally designed or historically accumulated. Where is legacy automation increasing deployment risk? Would you trust AI outputs with today's data quality? And what technical debt may be limiting your agility?

Looking Ahead

For the coming quarter, we recommend prioritizing one focused initiative: a Security Health Check, an Automation Modernization Assessment, an Agentforce Data Readiness Review, or a broader Governance & Stewardship Scorecard.

Connect with your Cirrius Consultant to align these efforts with your 2026 roadmap and ensure your Salesforce environment remains secure, scalable, and future-ready.

— The Cirrius Solutions Managed Services Team