MS - April 2026 Newsletter

As Salesforce environments mature, the focus is shifting. It's less about adding more and more about getting real value from what's already there.

This month we're highlighting three areas we're actively working through with clients right now:

- Data hygiene and AI readiness
- Where Salesforce is actually driving business value
- What's worth paying attention to in the latest release

📊 Data Hygiene: Small Gaps, Bigger Impact

Data issues usually build over time, slowly affecting automations, reporting, cost, and user trust. Clean data reduces avoidable issues, increases automation reliability and trust, while ensuring your SF Org is ready for future enhancements *(such as AI features – Agentforce or otherwise)*

What we're seeing most often:

- Duplicate records splitting the customer view
- Inconsistent field usage and nomenclature across teams
- Legacy data still driving reports

What's working:

- Ongoing deduplication, not one-time cleanup
- Tightening the fields that actually matter. Using dynamic fields as an option.
- Cleaning up stale or unused data increasing reporting reliability

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💼 Business Value: Where We're Seeing It

Most value isn't coming from big transformations. It's coming from small, focused improvements.

Where we're seeing impact:

- Service: cleaner routing and visibility leading to faster response times (& happier customers)
- Automation: removing manual steps and reducing human errors. Speeding up the time to deliver.
- Pipeline: more consistent data improving forecast confidence to make those big decisions
- CX: smoother handoffs between teams

The common thread is alignment. Value shows up when Salesforce reflects how teams actually work.

⚙️ Release Focus: What Actually Matters

Each release brings a lot. Most won't move the needle. And we are here to help you navigate through it all.

What we're focusing on right now:

- Flow: simplifying and consolidating existing automation
- AI / Agentforce: starting with clear use cases and clean data
- Access model: moving toward permission set driven design from Profiles (due end of 2026)
- Release readiness: validating automations and integrations in sandbox before enabling new features
- Reporting improvements: leveraging CRMA and Tableau instead of maintaining legacy custom reports
- User experience: small UI and page layout updates that reduce clicks and improve adoption

The teams getting the most out of releases are the ones filtering for relevance, not trying to adopt everything.

🎧 Featured Content: Data Readiness & Agentforce

As more teams begin exploring Agentforce, one theme continues to come up: success depends heavily on the quality of your underlying data.

We recently published a blog that breaks down the most common data issues we see before AI adoption and how to address them early:

Before You Build Your First Agentforce Agent: Fix These 5 Data Problems

- Data readiness is often the difference between AI delivering value or creating more noise.
- We're also continuing to share practical insights through our podcast series, CirriusTalk, where we focus on real-world Salesforce challenges, not just theory.

🎧 **Check out our latest episode!**

All episodes are available on Spotify, Apple Podcasts, and Youtube (all direct links below)







Looking Ahead

The pattern is pretty consistent. Teams that focus on clean data, targeted improvements, and disciplined adoption are getting better results than those trying to do everything at once.

If any of this feels familiar in your org, it's usually worth a closer look. Reach out to your Cirrius Solutions Consultant to learn more!