FROM THE DESK OF MANAGED SERVICES

Clean data is in place. Now the question is: is it actually working?

Automation is being modernized. AI foundations are being laid. Now the questions are shifting — how do we know it's working, why aren't users fully on board, and are we confident in the integrations holding it all together. This month, four themes we're actively working through with clients.

01 Reporting & analytics · 02 User adoption · 03 Integration health · 04 Salesforce ROI

01

Reporting & analytics maturity

Clean data only delivers value when the reporting layer can surface what matters. Many orgs run on legacy reports that are slow, hard to trust, and harder to maintain.

WHAT WE'RE SEEING

- Reports built for individuals, not organizational decisions
- Dashboard sprawl with no governance or ownership
- Manual spreadsheet exports filling the analytics gap

WHAT'S WORKING

- Governing shared report folders with clear owners
- CRMA / Tableau for real-time leadership dashboards
- Defining a small set of canonical KPIs and building around them

02

User adoption

A technically excellent org that users don't trust still underperforms. Low adoption quietly undermines every other investment.

COMMON FRICTION POINTS

- Page layouts that don't reflect how teams actually work
- Required fields that feel arbitrary to the people filling them
- No visible feedback loop connecting data entry to outcomes

WHAT DRIVES IMPROVEMENT

- Involving users before go-live, not after
- Fewer fields on screen, smarter defaults, dynamic layouts
- Regular check-ins to surface friction before it becomes habit

03

Integration health & API governance

Integrations are becoming their own form of technical debt. Many orgs lack a clear picture of what's connected and what happens when something breaks.

RISKS WE'RE SEEING

- Connected apps with broader permissions than needed
- Point-to-point integrations with no monitoring
- No documented ownership of each connection

A HEALTHIER POSTURE

- A maintained inventory of all integrations with owners
- Least-privilege API access — only the objects and fields needed
- Error handling and alerting built in, not bolted on

04

Measuring Salesforce ROI

2026 was framed as a year of accountability. Teams are being asked to show what Salesforce is actually delivering — a reasonable question that's harder to answer than it should be.

WHY ROI IS HARD TO MEASURE

- Value is often diffuse — faster response, fewer errors
- Baselines rarely captured before improvements
- Avoided cost doesn't appear in standard reports

PRACTICAL STARTING POINTS

- Identify 2–3 metrics leadership cares about and track them
- Document the "before" state before any improvement work
- Build a simple quarterly summary linking SF investment to outcomes

CIRRIUSTALK · WORKING SMARTER

Your company doesn't need more SOPs. It needs skills.

See how Cirrius turns that lengthy SOP document sitting in a shared drive — the one half your team has never opened — into a well-oiled AI agent skill. We run 27 active agent skills internally, and built a governance structure around them after learning firsthand what "the wild west" looks like when you don't.

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LOOKING AHEAD

Make the foundation visible, usable, and defensible.

The technical foundation is increasingly in place. Now the focus shifts. Clean data needs to become clear reporting. Good design needs to translate into user behavior. Value needs to be communicated in language leadership understands.

Talk to your consultant →

ACTION ITEM

Security contact — update required

Salesforce has a new area to update. You're advised to add your business's emergency security contact so the right person is reached in the event of a critical security event. Enter the contact's name, phone, and email.

→ Setup › Company Information › Security Contact

Name | Phone | Email

— **The Cirrius Solutions Managed Services Team**