



Salesforce Health Check

5 Critical Data Model Issues Preventing Accurate Revenue & Pipeline Reporting

Use this framework to identify potential problems in your own Salesforce instance and discover practical solutions to improve reporting accuracy.

Table of Contents

1. Inadequate Configuration for Recurring Revenue
 2. Disconnected Quote-to-Cash Process
 3. Inconsistent Opportunity Stage Definitions
 4. Poor Account Hierarchy Management
 5. Fragmented View of the Customer Journey
- Next Steps: Assess Your Salesforce Health

1. Inadequate Configuration for Recurring Revenue

The Problem:

Standard Salesforce objects aren't well designed for subscription businesses. Many companies force recurring revenue into the Opportunity object, losing visibility of renewals, expansions, contractions, and churn.

Questions to Ask:

- Can you easily distinguish between new business, renewals, and expansions?
- Do you have a clear view of upcoming renewals and their likelihood to close?
- Can you track MRR/ARR growth versus revenue from one-time sales?

Quick Win

Implement custom fields on Opportunities to categorize revenue types (New, Renewal, Upsell) and create roll-up summary fields on Accounts to track total contract value over time.





2. Disconnected Quote-to-Cash Process

The Problem:

Many organizations have gaps between their quoting tools, order management, and billing systems. This causes mismatches between what sales reps quote, what customers order, and what finance bills for.

Questions to Ask:

- Do your quotes automatically flow into orders without manual rekeying?
- Can you easily reconcile booked business with recognized revenue?
- Are discounts and custom pricing consistently applied across systems?

Quick Win

Create validation rules to ensure critical fields are populated consistently across Quotes, Opportunities, and Orders. Then build reports that compare expected versus actual revenue.



3. Inconsistent Opportunity Stage Definitions

The Problem

Without clear definitions for pipeline stages and gates, each sales rep may interpret stages differently, making forecasting unreliable and pipeline reviews inconsistent.

Questions to Ask

- Do all team members have the same understanding of what each pipeline stage represents?
- Are stage changes triggered by customer actions rather than sales rep opinions?
- Can you accurately predict close dates based on the current stage?

Quick Win

Document clear exit criteria for each stage, create validation rules to enforce data requirements at each stage change, and implement probability percentages that reflect your actual conversion rates.

4. Poor Account Hierarchy Management

The Problem

Companies with complex customer relationships struggle to get consolidated views of revenue across multiple locations, divisions, or subsidiaries.



Questions to Ask

- Can you roll up all opportunities across a customer's divisions to the parent account?
- Do you have visibility into multi-entity customers without running multiple reports?

Quick Win

Implement a consistent account hierarchy strategy using Salesforce's native parent-child relationships, and use Account Plans to manage targets at the level they're most relevant.

5. Fragmented View of the Customer Journey

The Problem

Silo'd data between marketing, sales, and service creates an incomplete view of customer interactions and makes it difficult to understand pipeline sources and customer health.

Questions to Ask

- Can you attribute revenue to specific marketing campaigns or channels?
- Do your sales teams have visibility into support cases when working renewals?
- Can you identify which customer engagements correlate with higher close rates?

Quick Win

Create custom report types that combine objects from different parts of the customer journey, and add rollup summary fields to highlight key service metrics on account records.





Case Study Snapshot

Optimizing Recurring Revenue Tracking

A telecommunications reseller struggled with tracking their complex mix of one-time and recurring revenue across both partner and direct sales channels. Their standard Opportunity model couldn't provide accurate forecasting nor visibility into renewal opportunities, and custom Order model and processes confused billing and sales.

By implementing a customized data model and process flows that properly distinguished between revenue types and sales channels, we helped them:

- Increase renewal forecasting accuracy - including getting a true picture of customer churn
 - Improve renewal rate by giving the account management team a better view of services coming out of contract
 - Identify at-risk recurring revenue that would have been missed in billing and commissions
- Reduce end-of-quarter reporting time by more than 80%

Next Steps: Assess Your Salesforce Health

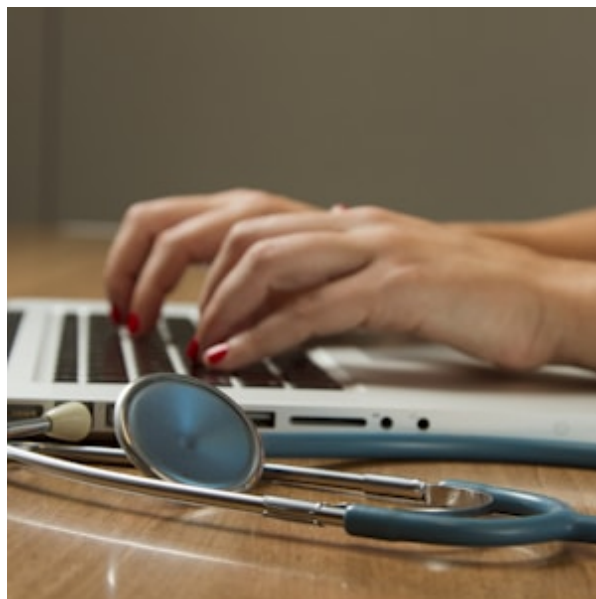
Take 15 minutes to evaluate your Salesforce instance against these five common issues. For each area:

Rate your confidence in your current setup (1-5)

Note any manual workarounds your team currently uses

Identify which issues would provide the biggest impact if resolved

If you discover areas for improvement, we're happy to discuss potential solutions in a no-obligation consultation.



This framework was developed based on our experience optimizing Salesforce for dozens of high-growth companies. Want to discuss your specific Salesforce challenges? Reach out to us for a personalized assessment.

[Schedule a Conversation](#)