

- Objects and Fields
 - Did they use standard objects and fields in a way that makes sense and aligns with their intended use cases?
 - Did they create custom objects to capture additional data?
 - Were any custom objects and fields created unnecessarily?
 - Were objects created in adherence to standard database best practices?
 - Were relationships set up appropriately?
 - Were master-detail and lookup relationships setup and used appropriately?
 - Were formula fields used in appropriate scenarios?
 - Were roll-up summary fields used in appropriate scenarios?
- Data Access Levels
 - Did they set up profiles and use them correctly?
 - Did they use permission sets/permission set groups?
 - Did they set up a role hierarchy?
 - Did they configure OWDs to a private or hybrid data model?
 - Did they use sharing rules?
 - Is tab and app visibility setup in a way that makes sense with their other data access settings?
- UI Customization
 - Did they use the Lightning App Builder to build record pages or use Page Layout editor only?
 - Did they use Dynamic Forms and conditional rendering?
 - Did they alter layouts of any standard objects?
 - Were record types used in appropriate scenarios?
 - Were any global or object actions created and used as part of the solution?
 - Do pages promote a good user experience?
 - Are all potential automations intuitive and easy to use?
- Declarative Automation
 - Were validation rules used to ensure data integrity in the Salesforce Org?
 - Were approval processes used in appropriate scenarios?
 - Were screen flows used to handle the creation of some custom UI pieces?
 - Were record-triggered flows used to handle any automation?
 - Were before and after flows used correctly?
 - Were these flows used in appropriate situations or could other tools, programmatic or otherwise, been used to greater effect?
 - Were any data management tools used to import/export data into their org?
- Programmatic Automation
 - Was Apex code written with best practices in mind?
 - Were Apex triggers used in appropriate scenarios with best practices?
 - Were before and after triggers used correctly?
 - Was any Apex code written that could have been solved more efficiently with declarative automation?