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Unearthing the Ghosts in Your Org:

A Practical Guide to Auditing Salesforce Technical Debt

Your org has ghosts. This is how you find them.

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About me:

What qualifies me to be your ghost hunter:

- Salesforce consultant, customer, alum
- In the ecosystem since 2009
- Focus on minimizing risk for regulated industries

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WAYFINDER
FIND YOUR PATH

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THE HAUNTING BEGINS

You didn't build this org.
But now it's your problem.

New job | Promotion | Acquisition | Consultants

No documentation. Half the builders are gone. The ghosts have moved into your org.

This session is the survival guide nobody gave you.

r/salesforce
u/dusch11 • 64d

Inherited an org with zero documentation, buried automations, mystery integration errors, constant break-fix chaos, anyone else fighting this?

venting 😤

I've recently inherited an org with no documentation whatsoever, no flows, integrations (how and what pushes to NeSuite), object field validations, apex... nothing.

I've been reviewing architecture and testing in the sandbox but still uncovering buried process builders and other processes, for example, random emails sent to sales reps after a stage changes on the opportunity. I turn one thing off and someone pings me that something's broken. It's 1 step forward, 2 steps back trying to figure out this org.

Anyone else deal with this when taking over an org? What's your biggest headache? How do you usually start tackling the mess?

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MEET YOUR GHOSTS — AND WHAT THEY'RE COSTING YOU

What They Look Like	What They Cause
Abandoned flows still running	Security gaps → audit failures, breach exposure
Orphaned fields on every layout	Open OAuth doors → unauthorized access
Integrations nobody remembers	Storage bloat → surprise overage bills
Licenses unused for years	Undocumented automations → process risk

Not all ghosts are bad. But hidden ghosts can put your org at risk when unmanaged.

Three ways to catch a ghost: In the order you reach for them

1

Native Tools

What you already have—no budget required

2

GenAI

The modern accelerator, now connected to your org

3

Third-party Apps

Purpose-built to clean up the mess

Start free. Add Claude. Buy a tool only when the first two can't reach the ghost.

Free tools already in Setup: These ghosts don't require a budget to find.

Tool	What It Finds
Health Check	Security baseline score — first stop, every time
Setup Audit Trail	Who changed what, and when — the org's changelog
Connected Apps / OAuth Usage	Forgotten integrations, stale access tokens
Org Check	Automations, Apex, Profiles, and more in need of optimization

👻 **First Ghost to Catch:** Run Health Check right away. One hour in Setup. You will find something haunting.

Native tools and Claude cover most hauntings. Reach for a paid tool only when you hit a wall.

Elements

Best for:

Field & automation inventory

Hubbl

Best for:

Org health scoring, benchmarking

Metazoa

Best for:

Deep metadata, sandbox comparison

Before you buy, ask one thing:

Did native + Claude already answer this?

Don't bring a thermal camera when a flashlight will do.

GenAI

Claude — powerful, but it can't read minds.

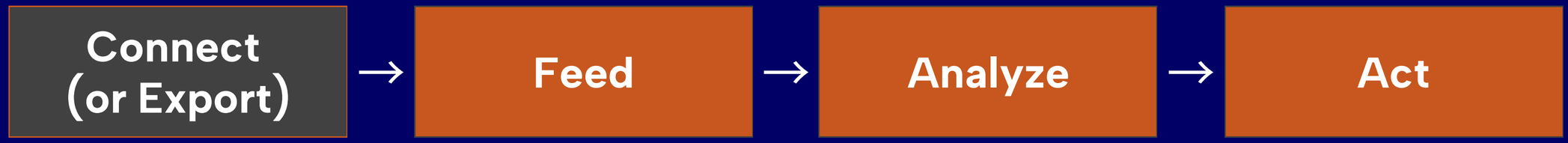
AI doesn't carry your org's tribal knowledge. MCP gives Claude access to your data and automation — not to the reasoning of the admin who left in 2019.

Bad prompts summon the wrong ghosts.

❌ "Audit my Salesforce org" is not a prompt. It's a séance.

The pace of change is scary. Be a smart ghost hunter.

Claude can connect directly to your live org — under your existing permissions. Salesforce Hosted MCP Servers went GA April 2026. Two ways in: connect live, or export and feed.



Callout — what "connect" actually does: query and search records, read schema, run Flows and Apex actions, pull Data 360 and Tableau, use Prompt Builder templates. Every call respects field-level security and sharing rules. Export stays the no-setup fallback for pure metadata.

CONNECT CLAUDE WITHOUT HANDING OVER THE KEYS

1

Enable Salesforce MCP in Setup

Hosted MCP is GA — it's config not a project.

2

Authenticate through an External Client App

Per-user OAuth 2.0 + PKCE. Classic Connected Apps don't work here.

3

Pick the smallest server that does the job

Salesforce ships graduated standard servers — start with sobject-reads (read-only), not sobject-all.

4

Connect as a least-privilege user, in a sandbox.

Standard servers are off by default and admin-enabled; their toolsets can't be edited.

DEMO: BETTER TOGETHER: HEALTH CHECK + CLAUDE

The prompt that catches ghosts hiding in plain sight

PROMPT

```
"Here is my Salesforce Health Check export. My org supports a B2B sales team
 of about 80 users and we use Experience Cloud for partner-facing deal registration.
Please:
 (1) Summarize what this score means in plain English — as if explaining it to a VP
   of Sales who has never heard of Salesforce Health Check.
 (2) Identify the three highest-risk items and explain the real-world business
   consequence of each — not just that it fails a benchmark.
 (3) Give me a prioritized action list: what I can fix today (no budget, no developer)
   vs. what needs planning or escalation.
 (4) Draft a two-paragraph executive summary I can paste into a Slack message
   to my CTO."
```

How this helps: One CSV. Four outputs. No code. No developer. Claude translates a 62/100 score into a CTO-ready escalation, three named risks, and a same-day action list.

DEMO: BETTER TOGETHER: CLAUDE + YOUR LIVE ORG (MCP)

The prompt that walks the org with you — no third-party license.

PROMPT

"Read-only connection to my sandbox, least-privilege user. Small B2B sales team, partner deal-reg portal, solo admin.
Run these four read-only queries: → Setup Audit Trail — human-made changes, last 90 days → Login History — successful logins, last 90 days → Active Flows — org-built only → Active Users — by last login
Then: (1) Surface what's abandoned, over-scoped, or stale (2) Flag security & compliance exposure separately (3) Sort the rest on an impact-vs-effort grid (4) Name anything you can't reach — I'll feed you the CLI metadata (5) Draft a 30-60-90 roadmap for my CTO”

How this helps: Same prioritized output a paid org-health tool gives you, sourced from your own org under your own permissions. The read-only server structurally can't create, update, or delete — so Claude interrogates the org and touches nothing. Deep code review hands off to the DX MCP path.

Prioritize by impact and effort — then go hunting in the right order.

HIGH IMPACT

LOW IMPACT

Quick Wins

High impact, easy wins
Security gaps, license waste

Strategic Projects

Plan carefully
Complex automations, org cleanup

Low Priority

Low impact, not worth the risk
Consider skipping

Don't Look Now

High effort
Not worth starting here

LOW EFFORT

HIGH EFFORT

Feed your full findings list to Claude with org context → it scores, ranks, and tells you which ghosts to chase first.

YOUR GHOST HUNTING TOOLKIT — TAKE THIS HOME

1

Run the native sweep today

Health Check, Connected Apps, Setup Audit Trail, Org Check — these ghosts are in plain sight. Go find them.

2

Connect Claude to Your Org

Hosted MCP is GA; start with the read-only server, in a sandbox.

3

Feed Claude the evidence, not wishes

Can't connect? Export it.

4

Score your org. Name your poltergeists.

Still stuck? Match a paid tool to the haunting — Elements, Hubbl, Metazoa. Only then.

Interactive Scorecard

Get your 5-minute personalized score

RESOURCES + CONTINUE THE GHOST HUNT

You inherited the haunting.
You don't have to live with it.

Tools in the kit:

- Native Tools
- Claude
- MCPs
- Third-party Tools

Interactive Scorecard & Bonus Materials

WAYFINDER

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Got ghosts? Let's talk.