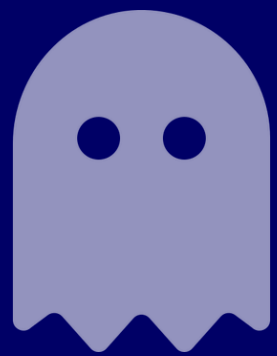


MIDATLANTIC DREAMIN' | PHILADELPHIA

Unearthing the Ghosts in Your Org:

A Practical Guide to Auditing Salesforce Technical Debt



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

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



Mike Rogan
Founder, Wayfinder



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

New job

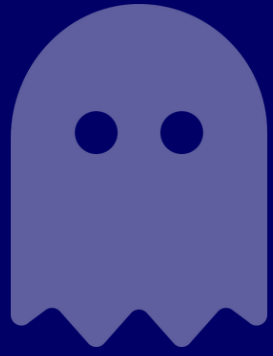
Promotion

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?

 37



 39



What They Look Like

Abandoned flows still running

Orphaned fields on every layout

Integrations nobody remembers

Licenses unused for years

What They Cause

Security gaps → audit failures, breach exposure

Open OAuth doors → unauthorized access

Storage bloat → surprise overage bills

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:

01

Native Tools

What you already have—no budget required



02

Third-Party Apps

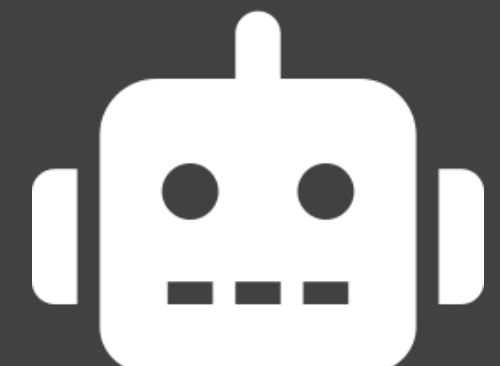
Purpose-built for the mess



03

GenAI

The modern accelerator



Run all three. Some ghosts only show up when you shine a different light.

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.

When the ghosts are too deep for native tools — you need something built for the mess.

Elements

Best for:

Field & automation inventory

Hubbl

Best for:

Org health scoring,
benchmarking

Metazoa

Best for:

Deep metadata, sandbox
comparison

3 Questions That Narrow It Down:

1. Do you need dependency mapping or just documentation?
2. What's your org complexity — objects, automations, users?
3. One-time audit or ongoing governance?

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

AI is powerful but lacks access to tribal knowledge. Some ghosts only live in people's heads.

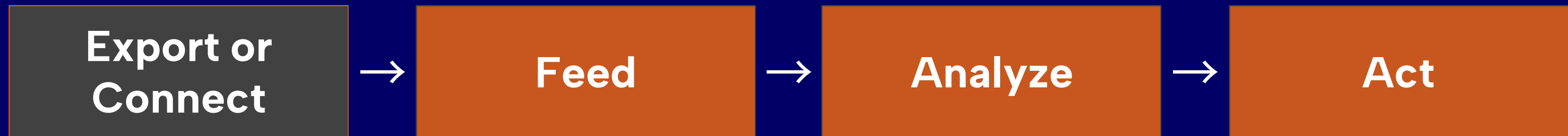
Feed AI the metadata and the human context. Let it help reconcile what's haunting your org.

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 now connect directly to your live org — with your existing permissions...Salesforce and third-party MCP server capabilities are rapidly evolving.



Export is safe for metadata analysis.

MCP options are live — use them when your permissions and governance are ready for it. I recommend using a combination of native tools, third-party apps, and tribal knowledge.

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.

The prompt that shows which ghosts to chase, safely

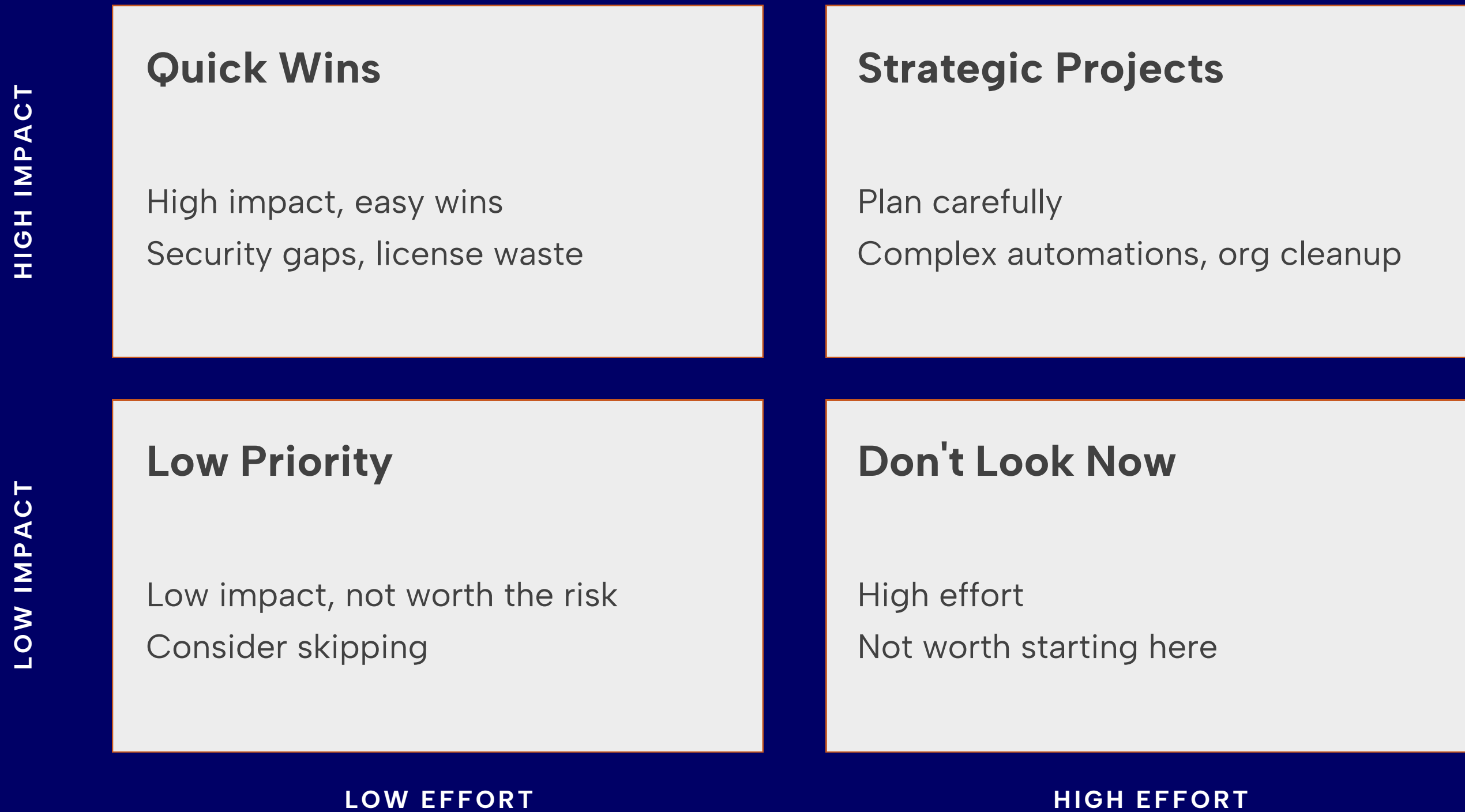
PROMPT

"Here is a top issues export from Hubbl, a Salesforce org health tool. My org context: - B2B sales team, approximately 80 users - Experience Cloud site for partner deal registration - Solo admin - no dedicated developer - No formal change management process currently in place Please: (1) Group the findings into four buckets using an impact-vs-effort framework: Quick Wins (high impact, low effort - fix this week), Strategic Projects (high impact, high effort - plan and schedule), Low Priority (low impact, low effort - document and defer), Don't Touch Yet (high effort, low impact - not worth the risk right now). (2) For each Quick Win, write a plain-English explanation of the business risk if left unaddressed - not technical jargon, but the real-world consequence. One to two sentences per finding. (3) Identify any findings that represent a security or compliance exposure and flag them separately, regardless of effort. These need to go to leadership regardless of where they fall on the effort scale. (4) Draft a prioritized 30-60-90 day remediation roadmap I can present to my manager or CTO - written in business language."

How this helps: Hubbl catalogs potential issues securely. Claude helps you prioritize what to take action on.

NOT EVERY GHOST IS WORTH CHASING

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



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

Match the tool to the haunting

Elements, Hubbl, or Metazoa — get a trial to shine the right light on the right ghost. Don't overdo it.

3

Feed Claude artifacts, not wishes

Export the evidence first. CLI metadata or CSV exports. The ghost is in the file — not in the prompt.

4

Score your org. Name your poltergeists.

You're not just auditing — you're making the case to leadership for remediation.

Interactive Scorecard

Get your 5-minute personalized score



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

Tools in the kit:

Elements

Hubbl

Metazoa

Claude

MCPs



Interactive Scorecard &
Bonus Materials



Connect:

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Got ghosts? Let's talk.

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BONUS SLIDES

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



Mike Rogan | mike@wayfinder.cc | [/in/mikerogan](https://www.linkedin.com/in/mikerogan)



Via Salesforce CLI (metadata as XML)



Via CSV Export (no CLI required)

Metadata Type	What Claude Does With It
Flows	Plain-English summary, dead paths, risk flags
Apex Classes	Governor limit risks, hardcoded IDs, deprecated APIs
Permission Sets	Over-permissioning, Modify All / View All exposure
Validation Rules	Logic docs, conflicting rules, deleted field refs

Export Source	What Claude Does With It
Setup Audit Trail	High-risk change patterns, external user flags
License Manager	Unused licenses by last login date
Connected Apps	Forgotten integrations, over-scoped OAuth
Login History	Shared credentials, inactive-but-authenticated users

NEW Third path — now GA as of April 2026: Salesforce hosted MCP servers let Claude connect directly to your live org. But please be careful.



Use Case	What You Feed It	What You Get Back
Flow Documentation	<i>Flow XML</i>	Plain-English summary, risk flags, ready-to-paste description
Apex Review	<i>Apex class file</i>	Plain-English explanation, developer escalation recommendation
Audit Trail Analysis	<i>Setup Audit Trail CSV</i>	Risk-prioritized change summary, ready to present
Tribal Knowledge Capture	<i>Interview notes + Flow XML</i>	Reconciled process doc, discrepancies flagged automatically
Prioritization	<i>Findings list + org context</i>	Scored action list, quick wins, executive escalation items



✗ Can't save you from yourself

Use guardrails. Live access now exists — via MCP Salesforce's hosted MCP servers (GA April 2026) give Claude org access under your existing permissions.

✗ Can't watch the ghost move

Reads Flow logic but can't observe how it behaves against live data

✗ Can't be 100% accurate

Treat all outputs as first drafts — validate before you act on them

✗ Can't haul unlimited luggage

Very large orgs may require chunking exports into batches

Claude is the ghost detector — not the ghost hunter.
MCP just handed it a key to the front door. You still decide which rooms it can enter.



You can stop the haunting.

Every Flow gets a Description.

Name it. Describe it. Future admins won't inherit a mystery.

Every change gets a record.

Slack thread, ticket ref, Setup comment. No undocumented changes.

Monthly native tools check.

A standing ritual. Ghosts don't announce their arrival.

Claude maintains living docs.

Run it at audit time and as the org evolves. Ghosts love stale documentation.

The best ghost is the one that never gets a chance to haunt.

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