

HOW TO MAKE A GREAT FIRST IMPRESSION

SALESFORCE SOLUTION ARCHITECT

90-DAY PLAN

Take your time to plan how you should approach your new role with a few helpful tips from Orchestrato

First 30 days

DISCOVER & ASSESS

- Understand the business strategy, technical landscape, and Salesforce ecosystem.
- Build relationships with stakeholders, delivery teams, and architects.
- Identify architectural gaps and opportunities.

31 to 60 days

STRATEGISE & ALIGN

- Define a scalable, future-ready Salesforce architecture.
- Align with enterprise goals and technical standards.
- Establish governance and architectural principles.

61 to 90 days

DELIVER & OPTIMISE

- Begin executing the architectural roadmap.
- Deliver high-impact solutions and establish architectural governance.
- Promote innovation and continuous improvement.



Checklist overleaf ...

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90-DAY PLAN CHECKLIST

First 30 days - Discover & Assess

☐ Stakeholder Engagement:

- Meet with business leaders, product owners, developers, and IT leadership.
- Understand strategic goals, pain points, and expectations from Salesforce.

☐ Review the Salesforce Architecture:

- Assess current Salesforce clouds in use (Sales, Service, Experience, Marketing, etc.).
- Review data model, integrations, automation (Flows, Apex), and security architecture.

☐ Evaluate Enterprise Alignment:

- Understand how Salesforce fits into the broader enterprise architecture.
- Review integration points with ERP, data warehouses, and third-party systems.

☐ Quick Wins:

- Identify and recommend improvements to inefficient or risky architectural patterns.
- Provide guidance on best practices for scalability, security, and performance.

☐ Build Trust:

- Be proactive, collaborative, and transparent.
- Share early insights and demonstrate architectural leadership.

31 to 60 days - Strategise & Align

☐ Define Architectural Vision:

- Create a high-level architecture blueprint aligned with business and IT strategy.
- Ensure alignment with Salesforce Well-Architected Framework and enterprise standards.

☐ Assess & Prioritise Initiatives:

- Identify technical debt, scalability issues, and integration challenges.
- Prioritise based on business impact, risk, and complexity.

☐ Develop a Roadmap:

- Create a 6–12 month architectural roadmap with key initiatives and milestones.
- Include platform optimisation, data strategy, and integration improvements

☐ Engage Stakeholders:

- Present the architectural vision and roadmap.
- Facilitate alignment across business, IT, and delivery teams.

☐ Establish Metrics:

- Define architectural KPIs (e.g., system performance, integration latency, data quality).
- Set up monitoring and reporting mechanisms.

61 to 90 days - Deliver & Optimise

☐ Lead Solution Design:

- Architect scalable, secure, and maintainable solutions for key initiatives.
- Review and approve technical designs, ensuring alignment with architectural standards.

☐ Support Delivery Teams:

- Provide guidance to developers, admins, and consultants.
- Ensure architectural decisions are understood and implemented correctly.

☐ Communicate Progress:

- Share updates with stakeholders and highlight architectural wins.
- Document and socialise architectural patterns and decisions.

☐ Establish Governance:

- Define architecture review processes and design standards.
- Set up a Salesforce Architecture Review Board (ARB) if needed.

☐ Promote Best Practices:

- Champion the use of Salesforce best practices, reusable components, and automation.
- Encourage innovation and experimentation within guardrails.

