

Changing Perspective on Permissioning



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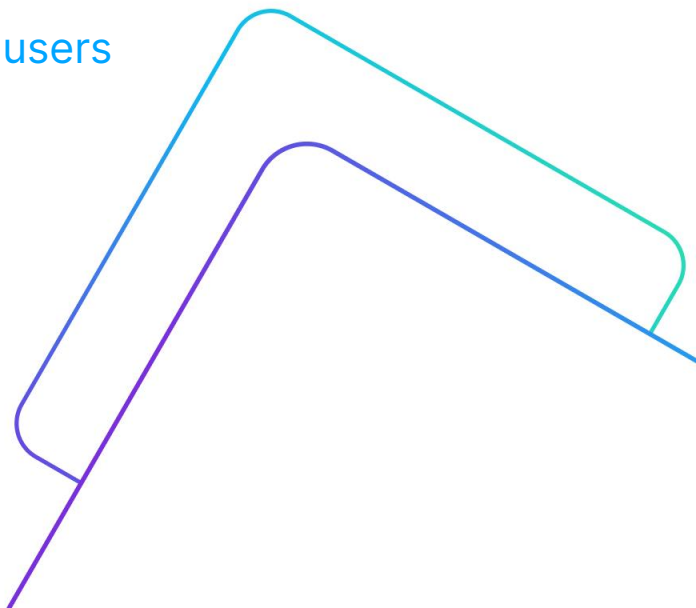
Out with the Old

Permissioning is a leading source for technical debt.

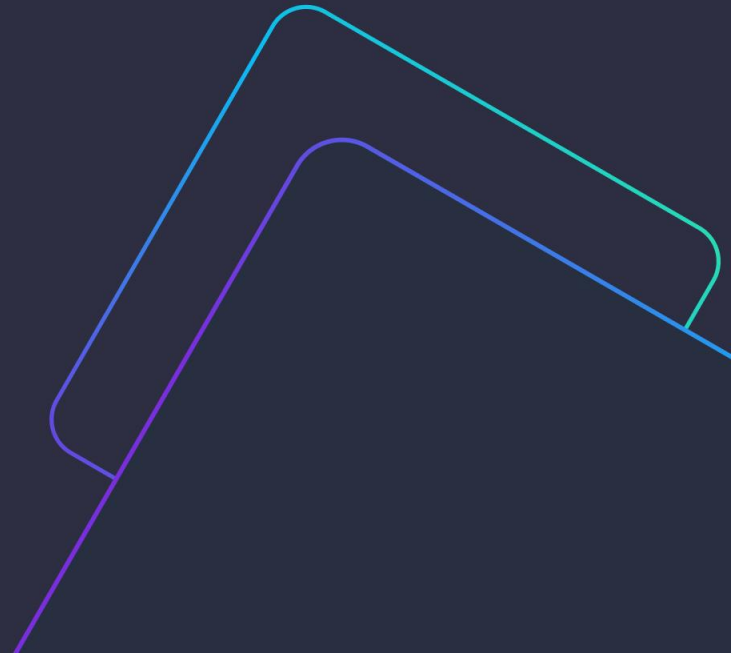
- Profiles are monoliths that cover broad sets of access
- Aligned with broad roles like 'Sales'
- Easy for wide updates to be applied
- Tendency to copy 'what works' for new profiles and users (poor adoption of integration user...)
- Become big, unmanageable
- Mix in Permission Sets...it gets messy



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While Salesforce has backed away from the Spring 2026 date for profile permission retirement their perspective has not changed.



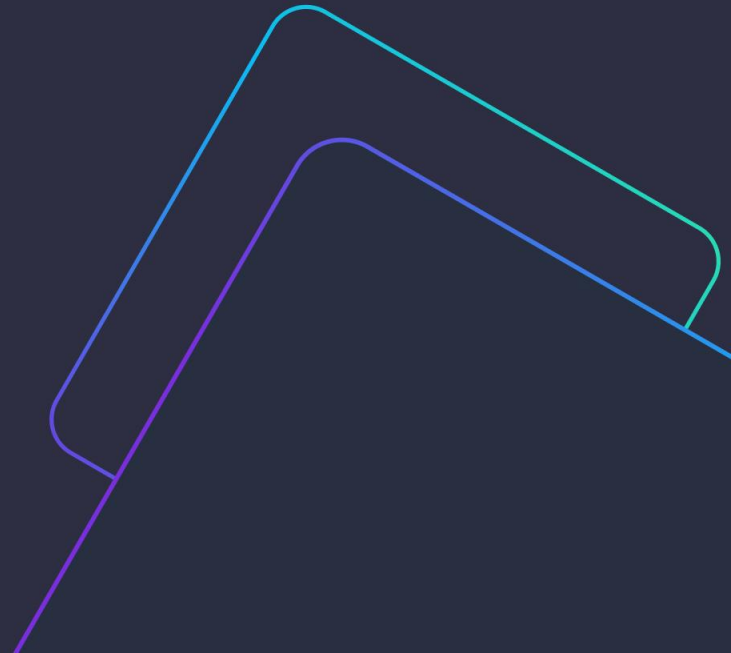
It's not the debt that'll kill ya'

With profiles as the basis of your permissioning, you create an asteroid-sized risk for your company

- 33 Dangerous Permissions
- Over access to data
- Compliance & Regulatory
- Well-meaning users & admins
- 1 bad actor.



Old approaches create an unmanageable web that introduces risk and Salesforce is moving on from legacy tools, its time for a new perspective.



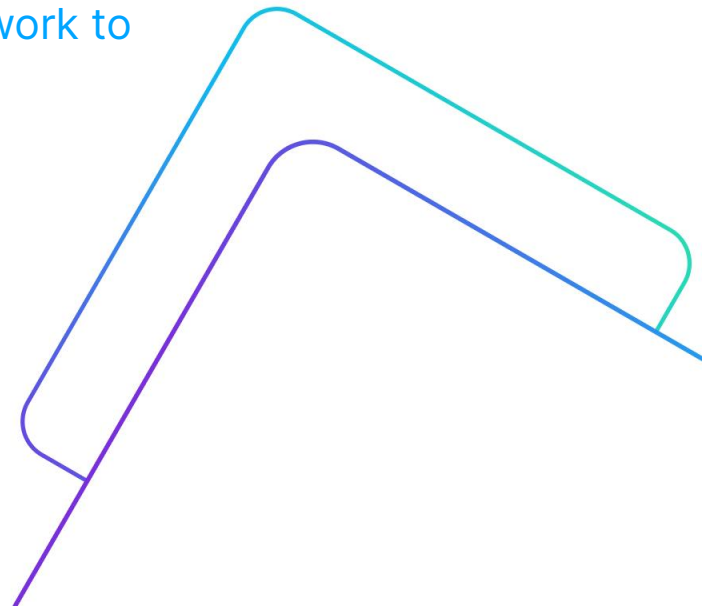
Jobs-to-be-Done

Principal of Least Privilege (PoLP) meets needs-based design

- Document business processes with tasks & actions
- Identify the permissions needed to complete those actions
- Define personas based on groups that have similar work to complete in Salesforce
- Give permissions based on identified reason
- Similar to zero-base accounting in approach
- Nothing is given, everything is earned



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Persona Driven Permission Groups

Persona
Permission Set Group

Persona
Permission Set - Persona Wide


READ
Permission Set - Department Wide

BASE
Permission Set - Organization Wide

PROFILE
Contains all the default record types, applications & tabs for each department/persona



Begin by Driving Value

- Technical debt
 - Documentation
 - Troubleshooting
 - User Setup
 - Risk
 - Regulatory & Compliance
 - Action is Required
- 

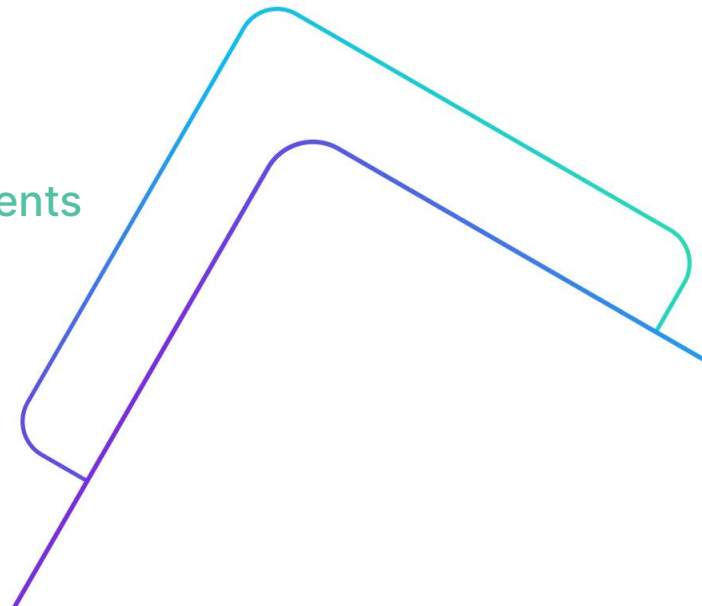
A Plan of Action

Opportunity to be strategic at your organization

- Begin with an assessment - has to include hardcoded profile references in Apex, Formulas (VRs), Audiences, Flows, etc.
- Define the debt & complexity
- Create the plan & level of effort
- Present to organization, lead with the value statements
- Does not have to be big bang
- Remember – you lose value every day you wait.



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Questions?



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