

Workflow Rules & Process Builder Migration to Flow

The Workflow Rules and Process Builder retirement presents a great opportunity to modernize your Salesforce org's architecture and processes. This checklist provides a comprehensive guide to planning and designing your migration strategy to Flow Builder.

Current State Analysis:

Thoroughly assess existing automations, code, and requirements to lay the foundation.

- ☐ Conduct comprehensive inventory of all Workflow Rules and Process Builders
- ☐ Review any related custom code, installed packages, and tools like Declarative Lookup Rollup Summary (DLRS)
- ☐ Analyze existing code coverage and test results
- ☐ Identify any code using deprecated API versions (21.0 - 30.0)
- ☐ Document all current requirements, dependencies, and business rules

Process Optimization:

Redesign processes from the ground up leveraging Flow's advanced capabilities.

- ☐ Map out current-state process flows for core processes
- ☐ Identify pain points, bottlenecks, and areas for improvement
- ☐ Design future-state optimized process flows leveraging Flow capabilities
- ☐ Explore ways to streamline processes by consolidating automations

Prioritization:

Strategically prioritize automations to migrate for maximum impact.

- ☐ Define criteria for prioritizing automations (business impact, complexity, etc.)
- ☐ Rank automations to migrate based on criteria
- ☐ Identify quick wins vs. larger long-term migration projects

Automation Strategy:

Define guidelines and governance for building and using Flows.

- ☐ Establish criteria for using Flows vs. custom code going forward
- ☐ Define governance model (naming, folder structure, etc.)
- ☐ Develop guidelines for building reusable Flow components & templates
- ☐ Determine integration needs and design integration interfaces

Roadmap Planning:

Develop a comprehensive, phased roadmap for executing the migrations.

- ☐ Create high-level phased roadmap for executing migrations
- ☐ Estimate level of effort and resource requirements
- ☐ Identify key milestones and timelines
- ☐ Plan training and knowledge transfer activities