

//The.
Guide.
Project

An **open initiative** by **Deloitte Digital**



Our know-how becomes a
how-to guide for every
company that wants to break
down digital accessibility
barriers.

Content

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- Where to start from?
 - *It begins from the assessment*

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- Whose responsibility is it?
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 - *Model in which Business leads*
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 - *Model in which the innovation center is created*

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 - *Gruppo CAP*

Chapter 1.

Where to start from?

It begins from the **assessment.**

Accessibility Audit

DESCRIPTION

I already have one or more active digital channels and I need to know their **level of accessibility** and possibly **how to close the gap**, responding in the meantime to **regulatory needs**.

ACTIVITIES

- **Accessibility Digital Channels Assessment**
Assessment on the state of the art of digital channels according to regulations.
- **Accessibility Remediation Plan**
Action plan to be implemented on digital channels to achieve regulatory compliance.
- **Draft of Accessibility Statement**
Support for the compilation of the accessibility statement required by the legislation.

ASSETS

- Accessibility checklist
- Audit Report Template
- Design and Development Best Practices
- Accessibility Statement Template

INVOLVED PROFESSIONALS



Design



Development



Governance



Legal Compliance

DELIVERABLES

- Accessibility Gaps Report
- Remediations List and Plan
- Accessibility Statement

TOOLS EXAMPLES



Google Lighthouse



Siteimprove



Apple Voice Over



Jaws

How is the **Accessibility Audit** performed?

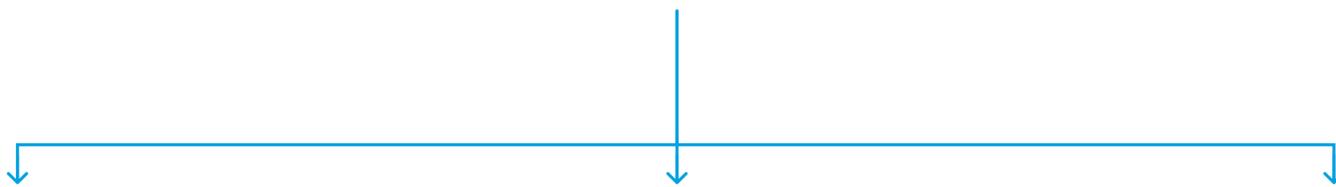
INPUT

Regulations and standards
(UNI EN 301549)



DIGITAL CHANNEL

DA11Y ASSESSMENT
MATRIX



OUTPUT



Accessibility
Gaps Report



Remediations
List and Plan



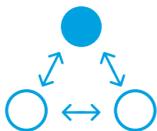
Accessibility
Statement

Chapter 2.

**Whose
responsibility is it?**

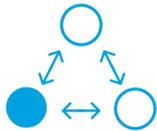
Deloitte's D.A11Y Framework supports all company roles in assessing and solving accessibility gaps.

Every configuration shows peculiar characteristics. However, to efficiently manage the assessment of accessibility, a **cross-functional organization** is able to coordinate all company branches.



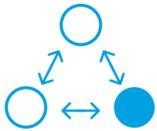
ICT DRIVEN

Suitable for organizations which use digital channels for promoting their products / services.



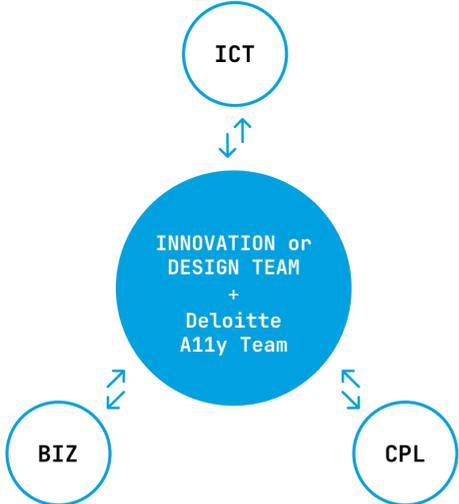
BUSINESS DRIVEN

For organizations in which digital channels are crucial for the strategy or market offering.



COMPLIANCE DRIVEN

Suitable for group holdings which need to manage legal risks related to accessibility regulations and perform internal audits.



INTERFUNCTIONAL TEAM

Suitable for organizations which want to dedicate cross-functional effort to face the accessibility topic.

Chapter 3.

**How to become
accessible by design?**

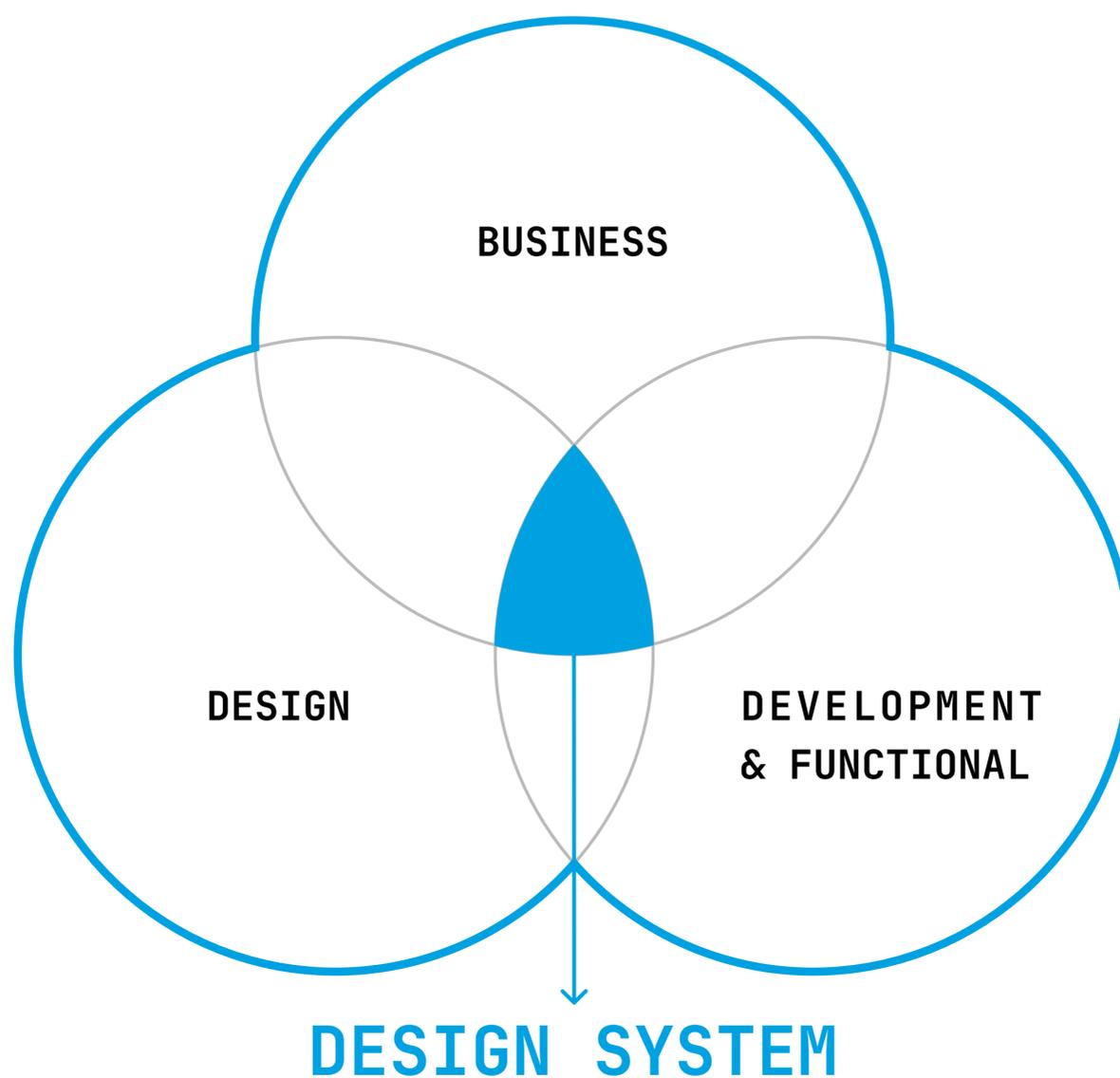
What a Design System is

A design system is a scalable framework of **decisions, standards** and **team behaviors** to manage design at scale by reducing redundancy while **creating a shared language** and visual consistency across different pages and channels.

A design system meets the needs of **business**, **designers** and **functional** and **development** team.

Over time, the cost of maintaining an interface (or multiple interfaces) managed by different designers and developers becomes high and efficiency decreases.

Solving this need requires a system that becomes the **single source of truth** that everyone can refer to.



What a Design System is NOT

- a Sketch or Figma library
- a style guide or pattern library
- only a design or development tool
- a repository of documentation
- a collection of brand guidelines

The maturity of your **Design System** defines the **digital maturity** of your organization.

ESSENTIAL

- Basic UI library repository
- Fragmented components structure
- Inconsistent language and practices

EXPANDED

- Anatomy of UI: guidelines on how components are built
- Documentation: rules and guidance on how to use the components
- Collaboration: Multiple design teams and stakeholders work together

CONSOLIDATED

- Processes are put in place in order to efficiently manage the assets
- Re-use components and build fast
- Adopted largely inside and outside the organization

EVOLVED

- Dev and design teams are synced with tokens
- Sustainable and quick evolution of product and services
- Processes are orchestrated and automated
- Testing and reviewing

ACCESSIBILITY BY DESIGN

Having a Design System alone is not sufficient to efficiently address accessibility concerns. It needs to have the right level of maturity to have an impact.

Chapter 4.

Case study **examples**



Content

- Our experience with Barbara Contini and Gruppo CAP
- Understanding the needs of blind users
- 1_Configuration of an accessible layout
- 2_Accessibility to reports and dashboards
- 3_Dedicated tools and assistance features
- Test and learn approach
- Conclusions and considerations
- Sources

Our experience with **Barbara Contini** and **Gruppo CAP**.

During our implementation work of **Salesforce** for **CAP Holding**, an Italian water service utility company, we faced the **challenge of making the platform accessible** even for **Barbara**, a **blind user**, to enable her to perform her tasks.

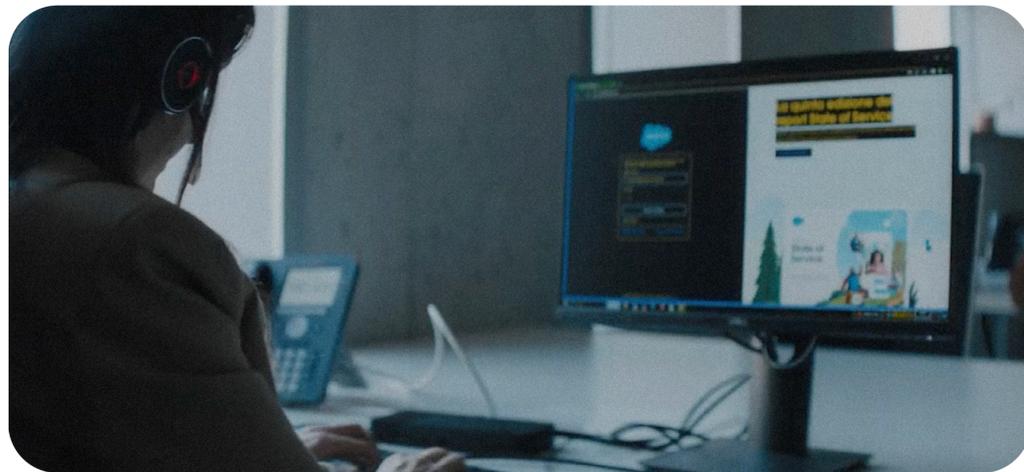
It is essential to ensure that **all users can access and use the platform effectively**, regardless of their visual abilities, so we provide a **guide on how to achieve this**.



Understanding the needs of blind users.

We involved Barbara from the beginning to listen to her difficulties in using the platform and understand how to intervene to unlock the operational potential of a blind user like her.

Navigation between pages and understanding of content were two of the main areas of difficulty. How can we resolve them^.



{ 1.

Configuration of an accessible layout

During the **initial configuration**, we set up Salesforce's global accessibility options to ensure a **solid foundation**. Then, we worked on the **layout of the screens**, **organizing them** in an optimized way with clear field labels.

Clear and meaningful labeling of elements is essential to ensure a smooth navigation experience for blind users.

- **Ensure that each field in the forms is properly labeled** so that the screen reader can accurately identify it.
- **Use descriptive names for buttons and links** to clearly indicate their function to blind users.

- Go to **Page Layouts** for the Opportunity object under the Object Manager.
- Create a **new page layout** and select an Existing Page Layout to clone. Name your new layout as is appropriate, in our example, "Opportunity Screen Reader Efficient Layout".

The screenshot shows the Salesforce interface for creating a new page layout for the Opportunity object. The top navigation bar is blue with the text "SETUP>OBJECT MANAGER Opportunity". On the left, a sidebar lists various configuration options, with "Page Layouts" highlighted in blue. The main content area is titled "Create New Page Layout" and contains a form with the following fields:

- Existing Page Layout:** A dropdown menu with "Opportunity Layout" selected.
- Page Layout Name:** A text input field containing "Opportunity Screen Reader".
- Feed-Based Layout:** A checkbox labeled "1" that is currently unchecked.

At the bottom of the form are "Save" and "Cancel" buttons. A blue information box at the top of the form contains the following text: "As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard section whose names are translated for your international users."

- In the **Page Layout Editor** (PLE), under Opportunity Detail, make the header for the top section display on the detail page.

SETUP>OBJECT MANAGER
Opportunity

Save Quick Save Preview As^^. Cancel Undo Redo Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find

Section	Cars Rollup	Custom Object 2	Forecast Category	Opportunity Currency
Blank Space	Close Date	Description	Last Modified By	Opportunity Name
Account Name	Contract	Exclude from ^^.	Last Source	Opportunity Owner
Amount	Created by	Expected Revenue	Next Step	Price Book

Opportunity Detail Standard Buttons Custom Buttons

Opportunity Information

Opportunity Owner	Sample Text		★● Close Date	11/1/2025
★● Opportunity Name	Sample Text		★● Stage	Sample Text
★● Account Name	Sample Text		● Probability(%)	248%
Type	Sample Text		Amount	USD 123,45
Primary Campaign Source	Sample Text			
Custom Object 2	Sample Text			
★● Opportunity Currency	Sample Text			
Cars Rollup	6,393			

Edit

Delete

Clone

Change Owner

Change Record Type

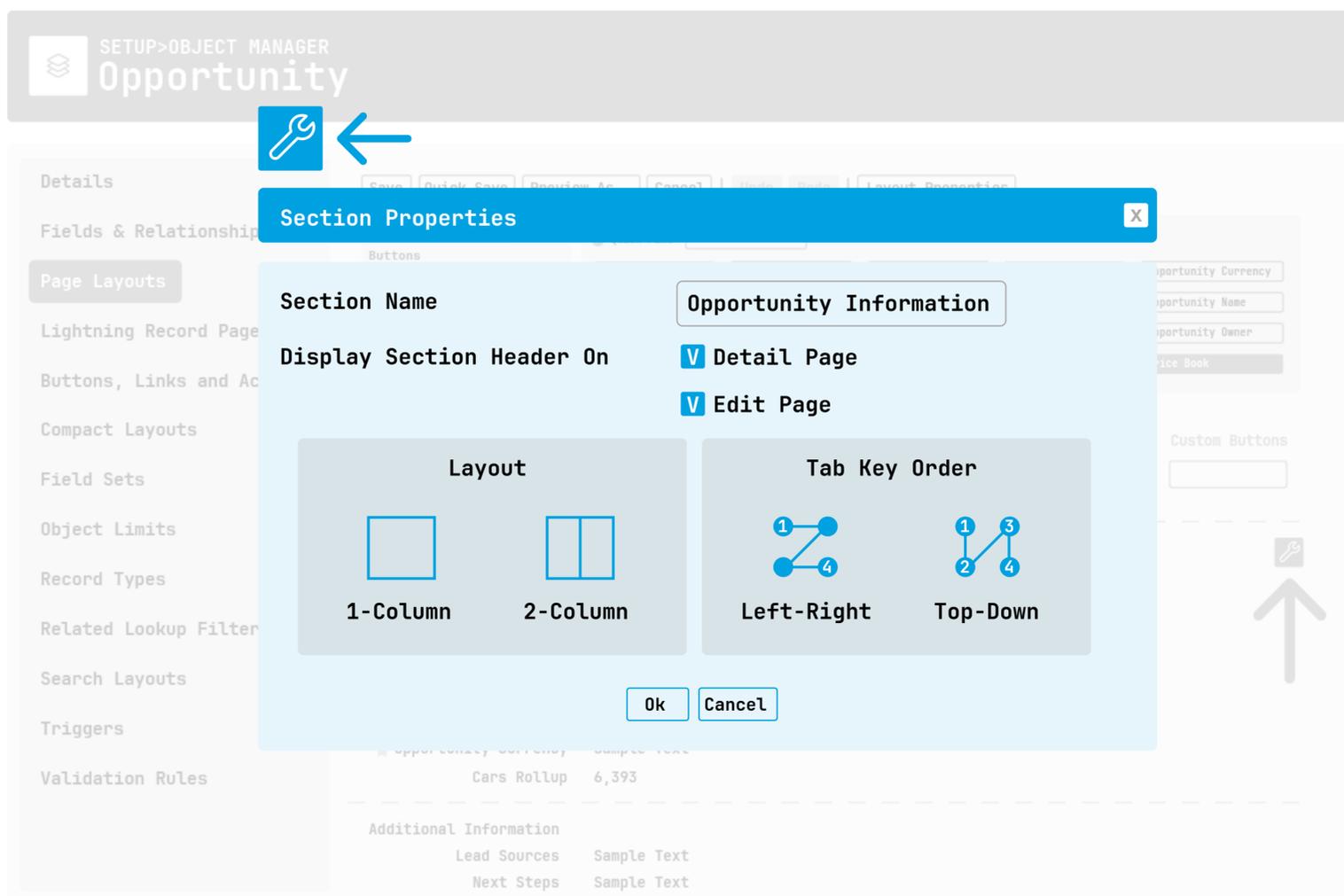
Sharing

↑

Additional Information

Lead Sources	Sample Text
Next Steps	Sample Text

- To do this, click on the wrench icon for this section in the PLE. Then make sure the **Detail Page** and **Edit Page** checkboxes are checked. Repeat this for all sections in the page layout.



- Remove any sections, fields, and custom actions from a record layout that your users do not need. This will **increase efficiency** in moving through forms and record pages.

Related Lists

⋮
⊖
🔗

Products Add Product Add Product Edit Products Edit All Choose Price Book Sort

Product	Quantity	Sales Price	Date	Line Description
Sample Text	596,08	USD 123,45	12/4/2025	Sample Text

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⊖
🔗

Open Activities New Task New Event

Subject	Name	Task	Due Date	Status	Priority
Sample Text	Sample Text	V	12/4/2025 10:28 AM	Sample Text	Sample Text

⋮
⊖
🔗

Activity History Log a Call Mail Merge Send an Email View All

Subject	Name	Task	Due Date	Assigned to	Last Modified Date/Time
Sample Text	Sample Text	V	12/4/2025 10:28 AM	Sarah Sample	Sample Text

⋮
⊖

Notes & Attachements

This list is not customizable

⋮
⊖

Contact Roles

This list is not customizable

⋮
⊖

Competitors

This list is not customizable

Opportunity Detail Before

Opportunity Detail Standard Buttons Custom Buttons

Edit Delete Clone Change Owner Change Record Type Sharing

Opportunity Information (Header visible on edit only)

Opportunity Owner	Sample Text	Amount	USD 123,45
Private	<input checked="" type="checkbox"/>	Expected Revenue	USD 123,45
Opportunity Name	Sample Text	Close Date	12/3/2025
Account Name	Sample Text	Next Step	Sample Text
Type	Sample Text	Stage	Sample Text
Lead Source	Sample Text	Probability(%)	883%
Opportunity Currency	Sample Text	Primary Campaign Source	Sample Text

Other Information (Header visible on edit only)

Additional Information (Header visible on edit only)

Order Number	Sample Text	Main Competitor(s)	Sample Text
Current Generator(s)	Sample Text	Delivery/Installation Status	Sample Text
Tracking Number	Sample Text		

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
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Description Information (Header visible on edit only)

Description	Sample Text
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Custom Links (Header visible on edit only)

Delivery Status



Opportunity Detail After

Opportunity Detail Standard Buttons Custom Buttons

Edit Clone Sharing

Opportunity Information (Header visible on edit only)

Opportunity Owner	Sample Text	Amount	USD 123,45
Private	<input checked="" type="checkbox"/>	Expected Revenue	USD 123,45
Opportunity Name	Sample Text	Close Date	12/3/2025
Account Name	Sample Text	Next Step	Sample Text
Type	Sample Text	Stage	Sample Text
Lead Source	Sample Text	Probability(%)	883%
Primary Campaign Source	Sample Text		
Opportunity Currency	Sample Text		

Other Information (Header visible on edit only)

Main Competitor(s)	Sample Text	Created By	Sample Text
Description	Sample Text	Last Modified By	Sample Text

Additional Information (Header visible on edit only)

System Information (Header visible on edit only)

Description Information (Header visible on edit only)

Custom Links (Header visible on edit only)

{ 2.

Accessibility

to reports and dashboards

Reports and dashboards must also be accessible to blind users to allow them to access information efficiently.

- Organize **reports logically** and use clear headings to **facilitate navigation** through the screen reader.
- Provide **alternative textual descriptions** for charts and images in dashboards so that blind users can **fully understand** the displayed **information**.

The screenshot shows a Salesforce Opportunity record for 'Big Bottle Orders 120'. A blue callout box titled 'Headings' lists the following accessibility information:

- 1:Big Bottle Orders 120
- 2:Path
- 2:Tabs
- 2:Activity Publisher
- 2:Activity Timeline
- 3:Next Steps
- 3:Past Activities
- 2:Products (0)
- 2:Notes & Attachments (0)
- 2:Contact Roles (0)
- 2:Stage History (1)

The background interface includes a header with the opportunity name, a table with fields like Account Name, Close Date, Amount, and Opportunity Owner, a progress bar, and tabs for Activity, Chatter, and Details. The Activity tab is active, showing a 'Recap your call' activity and sections for Next Steps and Post Activities.

- Here is a layout that is **optimized** for screen reader users. In this case, **not everything fits** on the screen at the same time, as our users will be navigating by heading.
- Now, when a user tries to navigate by header, even though a mouse user would need to scroll to see all of the content, a screen reader **user can access** all of the headers on the page. This allows for quicker navigation. To do all this, make a new Lightning Record Page.

Opportunity

Big Bottle Orders 120

Account Name	Close Date	Amount	Opportunity Owner
	10/16/2025	USD 1,000,000.00	Lee White

Opportunity Information

Opportunity Owner:

Amount:

Private:

Expected Revenue:

Opportunity Name:

Close Date:

Account Name:

Next Step:

Type:

Stage:

Lead Source:

Probability (%):

Primary Campaign Source:

Opportunity Currency:

Other Information

Main Competitor(s):

Created By:

Description:

Last Modified By:

Products (0)

Notes & Attachments (0)

Contact Roles (0)

Stage History (1)

Stage: Needs Analysis
 Amount: USD 1,000,000.00
 Probability %: 20%
 Expected Reven^: USD 200,000.00
 Close Date: 10/16/2025
 Last Modified By: Lee White
 Last Modified: 10/7/2025 3.44 PM

[View all](#)

Log a Call [New Task](#) [New Event](#) [Email](#)

Filters: All time - All activities - All types

Next Steps

No next steps. To get things moving, add a task or set up a meeting.

Post Activities

No past activity. Past meeting and tasks marked as done show up here.

Post Poll Question

Lee White updated this record.

Opportunity Name
Oppty 5 to Big Bottle Orders 120

Like Comment

{ 3.

Dedicated tools and assistance features

To **enable the experience** of visually impaired users, we enabled screen reading features on the new framework and **created new shortcuts** dedicated to the most used functions.

These changes made it **easier for blind users to navigate** between different sections of Salesforce and access important information, as well as connect and manage advanced processes.

- Check [Salesforce compatibility](#) with major screen readers such as JAWS and VoiceOver.
- Set up keyboard [shortcuts](#) to facilitate navigation and interaction with Salesforce through the screen reader.

Keyboard Shortcuts

Global		Navigation	
Close or deselect	Esc	Focus notifications	c
Edit	e	Focus notifications (reverse order)	↑+c
Insert quick text	⌘+,	Go to docked composer	g then d
Open or close Macros	m	Go to list search	g then f
Open or close Notes	n	Go to publisher	g then p
Post to feed	⌘+Enter	Go to utility bar	g then u
Save	⌘+s	Switch walkthrough focus	F6
Search	/		
Show this menu	⌘+/ /		

Test and **Learn** approach

The whole process lasted several months, during which we **elevated Barbara to beta test** the new interface.

This approach allowed us to promptly **identify and resolve any accessibility issues**.

Conclusions and considerations

"Projects such as the one carried out by CAP Holding make it possible to develop skills on the accessibility front that can then be reused to ground any other inclusion project, thus representing real learning for the company."

{ Luca Venanzetti,
Senior Manager Deloitte
Digital

Sources

- *How to Configure Salesforce for your Blind and Low Vision User*
- *Customize Keyboard Shortcuts*
- *Gruppo CAP and Deloitte Digital tell about "The Guide Project"*