



Best Practices for Salesforce Administration

Introduction

This document describes best practices for the long term administration of Salesforce. The document provides guidelines and considerations for developing your administration team. As each company has unique resources and skill sets, the following best practices and considerations are recommended, but not mandatory.

Ideal Administrator Background

Salesforce administrators do not need to be technically focused. The application is meant to be easy to use and intuitive for business users. However, this person must possess general knowledge of Web applications and Internet architecture as well as deep skills in Excel and Access. Having an administrator with a solid understanding of business processes across your organization is also critical to your success.

Salesforce customizations are encouraged and since features are released 2-3 times a year, it's important to understand how these changes will impact your organization and prioritize them accordingly.

Additional background on forming your initial project team and specific skills that an "ideal" administrator can be found in the link below:

Salesforce Getting Started Guide (Plan & Prepare, Chapter 1)

<http://www.scribd.com/doc/25556612/Salesforce-Getting-Started-Guide>

Ideally, you will be able to assign at least one full time resource and dedicate him/her to Salesforce. Understanding that resources are often constrained, administrators will typically wear many hats in addition to their Salesforce duties. Successful administrators come from various backgrounds, including Sales, Sales Operations, Marketing, Support, Channel Management, and IT (among others). In smaller companies, administrators may have backgrounds in several of these areas.

Responsibilities – System Administrator

The role of the administrator includes both tactical and strategic responsibilities. Primary responsibilities include but are not limited to:

- Understands all aspects of Salesforce configuration and technical/functional capabilities, including all changes and potential system implications related to the Salesforce release upgrades (currently scheduled 2-3 times a year)
- Communicates regularly with the Salesforce Business Owner, IT systems leadership, CRM Steering Committee and other stakeholders to ensure functionality meets field needs and to develop ongoing project plan.
- Maintains at least high-level familiarity with other IT system /business application capabilities and scope definition in order to make recommendations about potential upstream/downstream integration or functionality intersection points.
- Salesforce Sys Admin would champion Salesforce within the technology systems group, educating other team members on the capabilities and potential applications of Salesforce.
- Serves as key liaison with IT technical resources in areas related to system support for areas such as wireless, Outlook integration, etc.



- Supports Corporate Marketing's use of Salesforce, including assisting with mailing list generation/cleanup as needed and helping Marketing automate processes related to national marketing campaigns.
- Develops ad-hoc reports as requested by user groups or stakeholders, performs analysis on data as required
- Maintain and communicate system metrics to track trends in usage and data integrity.

Ongoing system administration, including:

- Manages all security settings and conduct regular security/configuration audits
- Manages all new user set-ups and deactivation, including transferring ownership of accounts/contacts/opportunities for deactivated users
- Executes all configuration changes (this may involve simply changing field names or could be more work-intensive project such a re-mapping fields and field value or doing a record update project that may require tools such as the Force.com Data Loader or Excel Connector).
- Performs new release evaluations with business owner & executes new functionality roll-outs
- Regularly audits data to uncover data integrity issues and/or opportunities for process improvement
- Performs mass data imports using the API or a import tools as requested by Salesforce Area Admins or others
- Manages and implements customization requests by Salesforce Area Admins, including creating workflow triggers, workflow alerts, automated email responses, etc.
- Maintains updated system documentation and Salesforce policies/procedures
- Maintains the Salesforce mailbox by promptly responding to user questions and requests for administrative support or forwarding on to an Salesforce Area Admin as appropriate
- Develops and maintains naming conventions of picklists, report folders, dashboards, etc. to improve system usability
- Performs manual or automated data entry/data clean-up as required
- Modifying the sharing model as required
- Modifying leads and case setup
- Modifying case setup
- Creating and managing email and mail merge templates
- Creating and modifying list views
- Creating custom fields and modifying picklist values
- Importing and updating campaign data
- Creating/Modifying Lead Assignment Rules
- Setting up Useful Links on the Home Page
- Creating Web Integration Links

To assist with these tactical responsibilities, you can use our Premier Support with Administration service. This datasheet outlines the administrative tasks that an administrator would perform (see Appendix – Administration Services):

Salesforce.com Support (see Premier Support with Administration)

http://www.salesforce.com/assets/pdf/datasheets/DS_Basic-Premier-Support.pdf



Responsibilities – Salesforce Analyst/Business Application Manager

Some larger enterprise customers have utilized a hybrid role titled “Business Application Manager” (BAM) within business units or Salesforce Analysts. The major focus of a successful BAM/Salesforce Analyst is to ensure 100 percent adoption rates within the customer’s user groups and to completely align Salesforce with the company’s business processes.

In many cases, we have seen senior managers take on this role and perform very well. Acknowledging that not every senior level manager has the time required to update the Salesforce application with every business process improvement the customer makes on a quarterly, monthly or weekly basis, it is suggested that the designated BAM/Salesforce Analyst have the following support, knowledge and responsibilities:

- Understands business requirements and how to effectively translate to Salesforce
- Possesses both strong and some tactical Salesforce skills to understand how changes may impact entire user universe
- Executive level support and belief in the benefits of Salesforce application for its user base
- Intimate knowledge of the organizational culture and structure
- Updated information on any organizational changes or business process improvements
- Ability to send updated training and benefits communications to the user group
- Excellent communication skills to help internally “sell” and “service” the user group
- Excellent training skills to perform ongoing training sessions (if designated “BAM” is also Salesforce internal trainer)
- Support of management to attend ongoing Salesforce training sessions as new features and on-demand versions of the application are launched
- Strong relationships with the managers of the user group to ensure proper use of the application
- Be the “voice” of the user community to represent to management commonly requested and needed changes to the application
- Hold quarterly update meetings with the initial Steering Committee to revisit application success factors and ensure incorporation of additional user requirements

Staffing/Headcount Guidelines

To summarize, headcount requirements depend on a variety of factors. In addition to the above considerations, additional criteria include whether Admins/Analysts have responsibilities beyond Salesforce, volume of user requests, whether they are leveraging Premier Support, as well as other unique factors that may apply to their specific situation. Below are some best practices to consider when staffing requirements.

A “named” administrator refers to a resource identified as someone dedicated to the Salesforce system administrator role on a part-time or full-time basis (“go to” person). A single resource may handle one or more of the administrator roles described above. FTE refers to Full Time Employee. A “named” administrator may have additional touch points with process owners who are responsible for process design and performance. The process owner is accountable for sustaining the process and identifying future improvements. Another determining factor that can skew the numbers below is the complexity of your implementation. Below are some additional guidelines to help build out your model.

- **Multiple Business Groups:** 1 named administrator for each business unit (e.g. Sales, Marketing, Support, Partner Channel, Professional Services, etc.) – each administrator can be approximated to 50-100% of one FTE. Depending on the size of the user base, some customers designate several BAM/BA roles, each representing a particular



business unit to assist with BAM/BA responsibilities, and to ensure cross-functional adoption rates and management support. See table below.

- **Geography:** 1 named administrator for each major geography (North America, EMEA, APAC, East/West/Central, etc.); “major” refers to geographies having distinct currencies, languages, business processes (e.g. sales/marketing/support/lead generation/channel management) – each administrator can be approximated to 50-100% of one FTE. Depending on the size of the user base, some customers designate several BAM/BA roles, each representing a particular region to assist with BAM/BA responsibilities, and to ensure cross-functional adoption rates and management support. See table below.
- **Number of Users:** Consider additional support, administrators or delegated administrators (see Note below) for every 200+ users. For example, if your North American sales organization has 380 users, you can start to consider adding resources with a business analyst or part-time administrator for example. This will balance the workload and mitigate the impact to your organization should you lose an administrator. Each administrator can be approximated to 50-100% of one FTE.
- **Note: Delegated Administration:** Delegated administrators can be assigned to manage users, assign profiles, manage custom objects and build reports to free up your regular administrators’ time – each delegated administrator can be approximated to 25-50% of one FTE. For Delegated Administration permissions please see **Help and Training**>Delegated Administrator.
- **Developer Support:** 1 named developer for custom development, including Apex Code, Visualforce, integration, and data migration/cleansing – % of one FTE can vary widely, depending on the level of development required/desired (this resource may overlap with one of the previously described administrators – if versed in Web Services development).
- **Global Presence:** For companies with global Salesforce users, having a centralized person who strategizes with key regional players is essential. Also, the Analyst/Administrator may want to become familiar with multi-currency/multi-language.
- **Backup Resources:** Backup resources should be identified and engaged consistently to ensure their skills remain current – each backup administrator can be approximated to 10-25% of one FTE.

Below are general headcount **guidelines** where titles may vary:

# Users	Resource
1-30 users	<1 Administrator
31 -74 users	1+ Administrator
75-149 users	1 Sr. Administrator, 1 Jr. Administrator
150-499 users	1 Salesforce Analyst, 2-4 Administrators
500-750 users	1-2 Salesforce Analyst, 2-4 Administrators
751+ users	Determined by multiple variables



Admin Training

It is highly recommended (mandatory recommendation for Enterprise Organizations) that at least one administrator attend the Administrator Workshop training to ensure this knowledge exists within your company. Although the application is meant to be intuitive and easy to learn, the Administrator Workshop will outline all of the available features and how they work together. This training provides students with a solid foundation in administration, which will enhance your ability to train new users and resolved issues, freeing up more time to explore advanced features in the application and drive adoption.

Class details and schedules can be found on salesforce.com. Contact your Account Executive or CSM for additional information.

http://www.salesforce.com/services-training/training_certification/admin/

For your non-administrators, having a formalized on-boarding/training plan for new hires will mitigate the training demands placed on your administrators. A comprehensive training plan will mitigate the time needed to get your new hires ramped and reduce the number of questions posed to your administrators and analysts.

Your training plan should include the Salesforce fundamentals training currently available online, in addition to content tailored to your organization, such as user guides, FAQs, and cheat sheets. This can be developed internally or with help from salesforce.com Education Services.

When trying to quantify the FTE cost of an administrator, do not forget to include the time required to train new hires on an ongoing basis.

Support

Also consider the level of ongoing support that will be required for your organization. This will be influenced by the quality of your training program, user skill set, complexity of implementation, new features, etc. You may have your users contact salesforce.com technical support directly, or you may want to have your administrators or help desk act as the first line of support. In the latter situation, be sure to estimate the amount of time you expect your administrators to spend troubleshooting.

Premier Support with Administration is an additional service available for purchase. This service includes a remote Salesforce administrator that acts as your own. This service is particularly beneficial for customers with resource constraints and/or those looking to implement significant functionality as quickly as possible. Fundamental administrative tasks can be handled by salesforce.com, allowing your team to focus on strategy and more advanced areas of the application.

Premier Support details can be found on salesforce.com. Contact your Account Executive for additional information.

http://www.salesforce.com/assets/pdf/datasheets/DS_Basic-Premier-Support.pdf

Lastly, for additional resources, check out Hire On-Demand, an employment hub dedicated exclusively to the Cloud-Computing community.

<http://www.hireon-demand.com/>