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100 Tips for Salesforce® Success

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CONTENTS

I. Introduction

If you are in sales, marketing or customer service, chances are you have worked with a customer relationship management (CRM) system. Salesforce was one of the first companies to introduce an entirely web-based CRM system.

Today, Salesforce has become the dominant provider of CRM systems to businesses. Over 200,000 companies utilize Salesforce Sales Cloud, Service Cloud, Marketing Cloud or one of the many other applications offered by Salesforce.

The purpose of this book is to provide brief, actionable tips relating to the purchase, configuration, customization and roll-out of your Salesforce system.

Many CRM projects are unsuccessful due to a variety of factors. In our experience, there are three critical areas to focus on that will lead to a successful implementation.

1. User-Friendly Configuration
2. System Pre-Populated with Useful Data
3. Effective User Training

Properly implemented, Salesforce will increase your sales, marketing and customer service productivity. Accumulating and organizing information about your customers and prospects in the correct way, will provide you with unparalleled business intelligence insight.

Every business can benefit from implementing Salesforce. Our goal is to help you get the most value out of the system you have purchased!

II. Negotiating Salesforce® Pricing

1. Best Time to Purchase

Like all publicly traded companies, Salesforce wants to end the year - and each quarter - strongly. But Salesforce's year-end date is January 31st (not December 31st) and quarter-end dates are (April 30th, July 31st and October 31st) - which is a month later than most companies. Consequently, there are many stories of aggressive pricing that transpired around one of these critical dates.

Also, each new fiscal year, beginning in February, Salesforce will often realign their sales territories and accounts. Prospects and existing customers are often re-assigned to new salespeople or aligned to new vertical, market or geographic segment. In anticipation of the annual realignment, salespeople - fearful they will lose an account or prospect they have been working on all year - may be even more aggressive in their efforts to close a deal before January 31st.

2. Purchase Only What You Need – You Can Always Add More Users Later

Salesforce encourages enterprise-wide use of their software and it can be very beneficial to have users from many departments on the system. However, bringing on multiple departments can take time, and purchasing licenses before they are activated can be costly. You pay for licenses you contract for, even if they remain inactive.

To optimize your contract costs, create a detailed matrix of whom you anticipate the users to be - by department, business unit or geography – and on what date you anticipate onboarding (activating) your users. Salesforce may bundle additional product offerings; understand what is being bundled, how much it truly costs, and whether you need it - or if your users will ever even use these products. You can always purchase additional licenses, but you cannot cancel contracted licenses. Each time you purchase additional licenses, you have negotiating leverage with Salesforce which can also be used to purchase additional products.

3. You Will Learn About Your Users Only After They Start Using Salesforce

Certain users will rarely log in; other users will use very limited functionality. For example, customer service users may prefer their legacy systems; finance users may run reports only quarterly or annually. You may find that you only need a license for one user in certain groups as these situations emerge, as opposed to purchasing licenses for everyone in the department.

4. Alternative License Types

Salesforce Enterprise (now called Lightning Enterprise®) is the most common subscription. Professional Edition (now called Lightning Professional®) is approximately 50% of the cost of a full Enterprise license and may be adequate to get started with. Force.com® licenses are dramatically less expensive - they are not full Salesforce Sales, Marketing or Service Cloud licenses - but offer limited functionality which can be expanded over time. There are also multiple varieties of Force.com licenses. Users who don't require access to Accounts or Contacts can benefit from Force.com licenses. Partner Licenses offer very similar functionality to full Salesforce Licenses but at a drastically reduced rate.

5. Purchase International Licenses from Your USA Salesperson

Salesforce licenses purchased outside the USA are often priced higher than those offered to USA-based customers. Consider including these potential international users in your license count for your overall purchase. This will increase the total license count for your negotiations, as well as eliminate the foreign mark-up your subsidiary might pay if they buy in their own country. All Salesforce Enterprise licenses offer translation and localization capabilities, so you can deploy licenses purchased in the USA, in other international locations.

6. Pay Attention to Renewal Terms

Salesforce encourages multi-year agreements in exchange for the most favorable pricing terms. Include language regarding the anticipated renewal price you intend to pay when that day comes. Ask for a renewal clause that renews your existing subscription at the current price, if you are renewing the same, or a greater number of users.

If the initial agreement includes additional products and services, negotiate renewal pricing on those items as well. Ask for passes to the annual Salesforce conference to be part of the renewal each year of the duration of the renewal, not just in the initial year of the renewal.

7. Protect Yourself from Unexpected Charges

Storage is not unlimited; Salesforce has storage limits. If you exceed your allotted storage, you could be facing additional annual costs that could be in the five-figures. API calls are also limited each 24-hour period. Information from a third-party E.R.P. system, could exceed the API limit if it is set too low, presenting you with additional charges later. Ensure you accurately calculate your storage and API needs when you first purchase Salesforce to save additional charges later as the data in the system accumulates.

8. Sandboxes

There are many types of Sandboxes; Full, Partial or Developer Sandboxes may incur additional fees. Never assume the standard Sandbox provided will have all the functionality you will need. You may require a Full or

Developer Sandbox later, and you will be facing additional charges.

9. Ask for a List of All Salesforce Products Offered

Storage, APIs, varying types of Sandboxes, Event Monitoring, certain HIPAA or PCI data encryption protocols, – these are a few examples of additional products and services offered by Salesforce. Many products will not be presented to you during your initial purchase negotiations unless you ask. If you don't know what to ask for, ask for a list of all products and services Salesforce offers (and could potentially charge you for) before you sign the initial agreement. Review the full product list carefully to determine items or services you may need later.

10. Improve Your Negotiation Posture

Your best negotiation tool when purchasing or renewing Salesforce is to have them truly believe that alternative CRM systems are a real consideration. You will create leverage if you communicate during your negotiations that you are 'piloting' or using alternative CRM systems. In addition, telegraphing that certain key individuals inside your company prefer Microsoft® or Oracle® products will send a message to the Salesforce representative that there are alternatives you may truly purchase.

III. Minimize Configuration & Development Costs

1. Implementation will Take Longer than You Expect

If you are implementing Salesforce for the first time, it can take longer than you anticipate to fully configure and implement the system within your organization - and even longer before the users are fully trained and up-to-speed. Full implementation can take three to six months, including the planning and business analysis phases. During this build and configuration stage, many licenses may remain inactivated. But remember, you pay for licenses you have contracted for, whether they are active or remain inactive.

2. ‘Pilot’ Implementation Licenses

Basic Configuration and Implementation can often be initiated with only a few licenses in place. For example, you have 72 potential total users (8 Sales Managers, 50 Salespeople, 10 Customer Service Agents and 3 Marketers). But basic configuration of the system can be accomplished with only one license for each ‘type’ of user. Choosing a pilot or test group of users will also help you to further flesh out the system requirements while not purchasing licenses you are not yet ready to use.

3. Think Globally Where Possible

Many companies sell globally. Even if you don’t have direct employees in other countries, you may have agents or distributors and may later find that that these entities can benefit from access to your Salesforce data (and vice-versa). Therefore, considering global users (and global data) when designing the system can save on system redesign and possible costly changes later.

4. Ask Employees to Create Checklists

Your employees will be the users of your CRM system; they know the day-to-day business. Ask them to list features they would like to see in the system. In addition, ask them to provide checklists of how they perform their various tasks. This information helps you gather the requirements to configure the system. It also enrolls the employees in the design (ownership) and use of the forthcoming system rather than having them feel the system has been ‘imposed’ on them.

5. Identify Object Captains

Objects in Salesforce are containers for information such as Accounts, Contacts, Leads, Cases and Opportunities. There are also *Custom Objects* that you create to store information that’s specific to your company or industry. Objects contain *fields* which is where specific data is stored.

Object Captains are individuals who are assigned responsibility for a specific object. For example, a sales leader may be the Object Captain for the Account record; a marketing leader would own the Lead Record. While making changes to objects is a collaborative exercise, assigning ultimate ownership to an object, identifies someone with ensuring fields and features are utilized or removed and that objects are properly maintained – including value list choices inside the object.

6. Use the ‘Five and Five’ Rule

Ask each Object Captain to come up with five critical questions they would like answered. For example, the Captain of the Lead Object might want to obtain information about the (1) lead source, (2) annual widget volume purchase, (3) current competitive supplier, etc. Questions can be different depending on the market segments; for example, if you are seeking new business from an active customer, the questions asked would be different than those asked to a prospective non-customer. But try to keep the number of questions to five or fewer.

Answers to the questions should also focus around the five most common, most desired or most useful answers. For example, if asking about competitors used, present a pre-defined list of five of the most relevant competitor names, as opposed to allowing free text entry of names.

7. Less is More

Many CRM systems are filled with hundreds of unused or out-of-date fields. Our research has shown that only 33% of available data fields in CRM systems are updated on more than 5% of the total records; one third of fields are used less than 5% of the time and another 33% are never used. Reasons fields become utilized include the field being duplicated somewhere else, as well as being designed to collect very obscure or non-relevant data.

8. Every Field Needs an Owner

Each Object contains *fields*. Examples of individual fields on the Lead or Contact Object are name, address, title, status, etc. Fields are where data is entered by the users. Often, during the design of a system, one manager may have ideas for multiple fields that another manager's employees should be tasked with updating. A marketer may want information capture on all kinds of attributes burdening a salesperson with data entry they will often refuse to comply with.

Frequently ideas emerge for dozens of fields that could collect possibly useful data. However, ensuring each field has an ‘owner’ mandates someone whose responsibility it is to fill in the field. Adding fields for other users you hope will fill in something is a wasted effort.

9. Avoid Custom Development

With each release, the standard functionality inside Salesforce continues to evolve. We often see companies fail to deploy available system objects such as Quotes, Entitlements, Projects, Assets, Content and Contracts that are standard features and could provide tremendous benefit to all users. Before starting any customization, you should fully explore the available standard functionality to determine if it can accomplish your desired goal. Many new standard features have eliminated the need for custom triggers and coding. There are often a variety of methods to achieve a desired feature or function within Salesforce. Too often, organizations will initiate custom development to add a feature. There may be standard functionality that can solve the problem, or even a third-party app or managed package that can be installed. The more ideas, the better.

10. Identify Possible Apps

The Salesforce AppExchange contains pre-built applications that can be installed into your Salesforce system very easily. Before the AppExchange made this possible, many customizations required writing Apex code or creating Visual Force pages. Scheduling, project management, human resources, call-center integration tools can now be found in easy to install and configure Apps that require no custom coding or development work. There are over 4,000 Salesforce Apps in the AppExchange. Many Apps have been built by Developers to solve similar problems you may have, or to create custom features and functionality similar to those you are seeking.

11. Many Development Items are 'Administration' Tasks

As Salesforce has evolved, configuration and administration has become much more complex but typically does not require custom coding. Installing and configuring tools such as Pardot or CPQ (Configure, Price, Quote) are not typically development tasks, but rather, are more of an advanced administration activity. Some individual applications (while easy to install) are very complicated to configure and require specialized knowledge of the App, rather than development or coding skill. Creating fields, objects, roles, profiles, workflows, reports and dashboards can be performed by a Salesforce Administrator (at much less expense) than hiring a Developer.

12. Developers are not System Architects

Salesforce Architects can be Technical, Application or System Architects and possess a wide breadth of system, functional, programming, application and business experience. Developers are typically more narrowly focused on the specific functionality they are tasked with creating.

System Architecture competency is not a typical skill for a Salesforce Developer to have and some projects require an individual with Architecture skills to design and manage. While some Developers may have experience with architecture, a System Architect is a separate set of competencies.

13. Many Developers are Unaware of the Full Extent of Salesforce Standard Functionality

With each new release, Salesforce adds more features and functionality to your system. One of the benefits of web-based software-as-a-service (SaaS) is that upgrades are installed automatically. Before starting any custom development, explore Salesforce standard functionality to determine if there is a feature that can accomplish your needs at the administrative setting or configuration level. Many users are too quick to request customization when standard functionality will provide the solution at a lower cost and with less-complexity that could cause problems later.

14. Research Software with Pre-Built Salesforce Connectors

Outside of the Salesforce AppExchange products, there are hundreds of established software providers who have created inexpensive standard connectors to Salesforce.

Technology with pre-built connectors provides you with a more packaged software solution on the application side, than company specific application development on the Salesforce platform. However, some pre-built connectors are rigid and may lack an ability to be modified, so they should be tested before purchasing them.

15. Identify Developer Competencies–What does Your Developer like to do?

Developers often have specific interests and skills and come from all types of backgrounds. Some are programmers, while others like to troubleshoot errors. Some enjoy data migration tools and projects; others prefer to focus on building Apps. Understand what type of development you need and select the Developer with the proper skill set and personality.

16. Understand Your Stage in the System Lifecycle

There are multiple stages in the Salesforce system lifecycle (Planning, Requirements Gathering, Building, Testing, Deploying, Maintaining, Training Users, Support, etc.). Developers (and other project participants) who may be experienced with building and testing may not be the best choice for the training and support stages.

17. A Variety of Skills can be Valuable

Salesforce credentials are an effective way of vetting potential Developers. But other attributes such as specific business experience, cultural fit and system lifecycle familiarity can be critical to the success of your efforts.

A Developer with an actual understanding of your business can save a tremendous amount of cycle time and pre-empt many errors. Communication skills are also critical…. Does your Developer listen to what you are saying? Does he or she understand the request? There is often an enormous communication gap between a business user's desired goal and the Developer's understanding of their task.

18. Hire a Techno-Functional Consultant

The Techno-Functional Consultant is a unique specialty. They map the functional requirements into a solution architecture. They are typically a bridge between the Business Analyst and the Developer. The Techno-Functional Consultant is the expert having with the knowledge of the code, coding standards and implementation life cycle. Their main role is to do customizations, extensions, modifications, localizations or integrations to the existing product.

They bridge the technical gap of an organization through their expertise and provide a level of insight that is different than that of the Business Analyst or Project Manager.

19. Know Where Your Developer is Located

'Offshore' Developers are those based outside North America or Europe. This can include countries such as India, Nepal, the Philippines, China, South America, etc. Offshore Developers often have a very high level of technical skill, but the distance can present many problems:

- A cultural disconnect - since your business's product or service may be completely unfamiliar to the person developing your application.
    - How can someone really provide an insurance solution if they don't know what 'insurance' as a concept is?
- Communication challenges due to language and time-zones.
    - 12 and 14-hour time-zone differences make real-time collaboration and conversation very difficult; not everything can be adequately explained in an email.

Many Developers work in teams to provide ongoing availability. But a dedicated Developer may be more effective than a team where each new person you encounter requires an explanation, and may have a different approach to meeting the goal. Be sure you understand the number of layers between you and the actual Developer doing the work. These layers include Business Analysts, Project Managers, Techno Functional Consultants, etc.

IV. System Governance

1. Limit Users with System Administration Level Permissions

A Salesforce User with the System Administrator Profile has full system administration level access, giving them the ability to delete all data and configurations. This presents an enormous security risk for companies. There should be no more than one, or two full System Administrators. If additional users need administrative privileges, Delegated Administrator settings or permission sets should be used to provide access to the necessary objects or system settings.

2. Minimize Number of Profiles

Keep the overall number of profiles to a minimum as well as ensure that no profiles (other than the System Administrator) have unauthorized access to Controllers. Ensure that you limit the number of users who have access to all records– especially the ability to delete records. Users should only have access to the records they need. And you can block the ability to export records for certain users if required.

3. Deactivate Departing Employees Immediately

Salesforce is a web-based application, not an internally housed application. Companies sometimes forget that although the user may have been deactivated from all internal company systems and networks upon their termination by the IT department, Salesforce continues to run and be accessible over the web, to all active users with a user name and password. Departing employees need to be have their Salesforce access frozen or deactivated immediately.

4. Create a Data Protection Policy Document

A Data Protection Policy should include an explanation about the personal data you collect and the specific reasons why. You should also have written policies about informing individuals about the personal data you possess about them, and outline procedures to give them access to their data. If your core business involves processing personal data, a Data Protection Officer (DPO) should be designated. This could be an existing employee tasked with this function in addition to his/her other role, or it could be an outside consultant.

5. Review Roles, Profiles and User Access

Your Salesforce system offers many methods of segmenting and partitioning data to ensure only certain users have access to certain records. Many companies leave their Salesforce system unpartitioned, providing internal users with full access to all contact records regardless of their position in the company. Employees will come and go and may take important data with them when they leave. Your Data Protection Impact Assessment should include a review of your Salesforce users and which records and specific data fields on those records each user has access to.

6. Implement Data Partitions

Salesforce settings allow you to block certain users from seeing specific records- or parts of- those records. In addition, you can block the ability to export data and specify where users can and cannot log in from at the IP address level (such as only within the company offices). Password policies can be updated to mandate more frequent password changes.

7. Ensure Proper Ownership of Records

Deactivating a user does not change record ownership. This means that (depending on the organizational settings) all the Lead, Contact, Account, Case and other records that may have been connected to a deactivated user may no longer be visible or accessible by other users. Ensure that all records have an active user owner and that they do not become invisible.

8. Re-format and Standardize Phone Numbers, States and Countries

Phone number formats and entries for States and Countries can vary. Phone numbers may have dashes, dots, slashes or just digits. Running periodic clean ups to ensure the formatting is consistent helps keep your data organized. Review fields with value lists for inconsistent or rogue values.

9. Clean up Old Opportunities, Cases and Leads

Ensure there is a process for closing or removing old opportunities, cases and leads. Lead buckets often accumulate tens - or hundreds of thousands of unqualified leads which are never converted to Accounts nor removed.

10. Have a Process for Removing Duplicate Records

Duplicate records wreak havoc on your Salesforce system, yet many companies have no established process for de-duplicating records. When duplicate records proliferate, users lose trust in the system; notes and opportunities are recorded inside the wrong records, and reports and dashboards become inaccurate. There are many tools for identifying and merging or removing duplicate Leads, Contacts, Accounts and other records.

11. Implement Daily System Backups

There are many third-party solutions available for backing up your Salesforce instance. Backups are inexpensive and can provide the ability to restore the system or records as of a certain date. Backups should retain copies of record data as well as system metadata.

12. Create a Salesforce Request & Administration Object

All system and administrative changes should be documented somewhere. The Case object can be used, but creating a separate object called the Administration Object assigns a special area to make notes about any changes made to the Salesforce system. A Salesforce Request Object is a custom object which allows users to report problems, submit feature requests, or simply request assistance. Chatter can also be used to allow users to submit requests. This provides a method for users to communicate with you about various issues and for those notes to be captured and maintained.

13. Don't Schedule Meetings Too Frequently

Some organizations get in the habit of scheduling governance calls or meetings monthly or even weekly. There is often nothing new, or significant to discuss, and participants become bored and tune out. In addition, there can be dozens of invitees, even if there is nothing relevant for them specifically. Schedule governance meetings when there is something useful to discuss. And using the 'Object Captain' concept can help identify who really needs to be involved in a specific governance discussion, limiting marginal attendees who add little value and slow down the process.

14. Enhance the User Profile Record

The User Profile Record is the record about your Salesforce users. Profile naming typically represents access level and may not provide much information about a specific user. It is helpful to add a field to list a user's direct supervisor as well as ensure the user's title is noted and updated as their position changes– even a field on the User record with a brief description of the individual's specific job.

15. User Training

Ensure that new hires are adequately trained in all areas of the system they will need access to. As features are changed or added, ensure there is a comprehensive process for delivering training to all groups of users; users may be scattered around multiple offices, remote sites or even continents. Training should be made available in multiple languages if the situation demands it. If you have Partner Users, ensure that training is provided to them as well.

There are typically individuals inside the company with a high level of technical competence. These users will embrace the functionality as well as provide new ideas for feature improvements and helpful Apps to consider. Formally identifying these 'Salesforce Power Users' and harnessing their excitement about, and familiarity with the system can provide a team of potential training experts who are close to the new users who need training.

16. Don't Ignore Your Data

CRM systems need a Master Data Management Strategy that delivers 100% data integrity. Without data integrity, users will abandon the use of the system in droves because they cannot trust the data. A Master Data Management Strategy ensures record hygiene, address correction updates and most importantly- a process to merge or remove duplicate records that accumulate.

V. Streamlining an Existing System

1. Identify Objects & Fields No Longer Used

Many organizations that utilize Salesforce find a proliferation of objects and fields over time into which users are not entering any data. There are many tools are available to scan your Salesforce Instance to identify which fields and objects are or are not being utilized. In a recent analysis of multiple client Orgs, we identified that less than 33% of fields were being populated on more than 5% of the total number of available records and found on average, another 33% of fields were never populated – no data in them whatsoever – on even a single record.

2. Determine Why Objects and Fields Fell Out of Use

We identified several reasons for a lack of field/object use; they may refer to obsolete products or could be duplicated somewhere else - common for fields such as 'Competitor' which can often be found on each of the Lead, Account and Opportunity objects, requiring a user to fill it in three times. Some fields existed because a disconnected legacy system required them at one time, but the most common reason for fields becoming irrelevant and unused was simply because they asked for collection of non-critical (and sometimes even ridiculous) information.

3. Reduce Data Security Risk by reducing Roles, Profiles and Permission Sets

Many companies create roles and profiles for Salesforce users that mirror job titles; it is not uncommon to have a separate profile for Marketing VP, Marketing Director, Direct Mail Manager, etc. all which have the same set of permissions. Create Profiles based on the level of access required such as, 'Marketing User-Full Access', 'Marketing User-Limited Access', etc. The fewer the number of Roles and Profiles in use, the easier it is to ensure that data that should be off-limits is not visible.

4. Reduce Number of Record Types and Page Layouts

In conjunction with a runaway number of Roles or Profiles, we frequently see Record Types and Page Layouts which have been created for individual users, but which have few differences in what is being presented. Best practices dictate that visibility into fields and objects should be controlled at the Profile level or via Permission Sets, not by creating numerous Record Types or Page Layouts.

5. Free Up Your Data Storage by Deleting Old Items

Salesforce has storage limits. If you exceed your allotted storage, you could be facing additional costs that could be in the five-figures. Run reports on Accounts, Leads, Contacts, Cases, Opportunities which include the created date and the date the record was last modified to identify old records which can be removed and archived elsewhere. Campaign records use up a massive volume of available storage capacity because each campaign effectively duplicates the Contact record for storage purposes. Export Campaign information for historical purposes and delete the actual Campaign itself.

6. Delete Old Reports

Salesforce makes it easy to create reports frequently leading to a proliferation of reports created by various users. Create folders to house a certain type of report and set clear parameters such as limiting the number of reports in a folder (to 10 or 12) before requiring a new folder be created. This type of approach to report creation and maintenance keeps your reports up to date and easy to find, among what can sometimes be thousands of available reports.

Also establish periodic dates to review all reports to identify which ones are obsolete and can be deleted. Legacy reports also present a data security risk as unauthorized users can access fields and information that should be off-limits to them.

7. Identify Field Owners & Users

We found the most common reason for field non-usage was due to it referring unimportant information. We also noticed that individuals inside a business would mandate a field be created to collect data – but nobody had been identified as the key user of that field and held accountable for its subsequent data updates. Users provide many great ideas for enhancing objects. For example, many departments (other than customer support) may interact with the Case Object and request modifications or provide ideas about new fields to add. While system governance is a collaborative exercise, identifying an Object Captain provides ownership and allocates responsibility for maintaining fields, picklists and even the volume of records historically retained for that object.

8. Today's Users are Mobile

Since users commonly access Salesforce through mobile devices such as tablets and cellphones today, smaller screen space limits the number of fields that are visible without extensive scrolling. Also, mobile users cannot type as they would on a keyboard, and therefore require increased use of value lists and check boxes to enter data.

9. Less is More

Employees have more systems and apps today to interact with than ever before. Your Salesforce system is likely not the only system they interact with daily. Condensing and simplifying information will help organize your user, makes the data collection more concise and provides a training template for their Salesforce use

10. Think Globally Where Possible

Even small companies conduct business globally today. If they don't have an international sales force directly, they may have a distributor or agent channel in other countries. Salesforce Partner, Portal and Community Licenses allow use of your Salesforce system by various third-party organizations. Global users should be considered whenever fields, objects and other system components are being designed and deployed, even if there are no global users at the current moment.

VI. System Migrations

Sometimes, two or more different Salesforce systems need to be consolidated into a single system or ‘instance’ due to a merger or business consolidation. This type of system migration presents unique challenges.

1. Understand Contents of the Source System

Evaluate the contents of the source system to be migrated, which objects and fields are still relevant to the business, and which fields contain data that will be needed in the target system.

2. Watch for Special Custom Objects

There may be unique custom objects as well as objects created by installed AppExchange Apps which contain important information. Determine if installed packages, templates or Visual Force pages need to be reinstalled.

3. Migrate Only What is Needed

Data to be migrated in old systems often contains many years of sales, support and marketing history. There could be millions of support cases. Salesforce has storage limits and if you exceed your allotted storage, you could be facing significant additional costs.

4. Create Custom Fields for Critical Legacy Data

Record IDs in the target system will be new. During a migration, records being copied from the source system will be recreated as entirely new records in the target system. This means that all new created records, users, notes, etc. will have a new unique Salesforce Record ID. Old cases will be recreated as new cases, with new case numbers and new case creation dates.

5. Capture Legacy Dates, Owners and IDs on Every Record

Create fields on every record type (including standard and custom objects) tasks, activities, events and note records that capture the legacy data such as legacy record owners, legacy record ID, legacy record creation date, closed date, status fields, etc. Having records in the new target system which contain this legacy information will be helpful if users or customers need to refer to old case numbers. In addition, updating records and correcting errors will be much quicker.

6. Ongoing Synchronization Approach vs. One-Time Cutover

An ongoing synchronization is a method of migrating data into a new Salesforce system allows a gradual load of data (movement of records) into the target system. Because completely populating the target system can take days or even weeks, an ongoing synch allows users to remain active on the source system until the data has been completely copied into the target system. Users can then be activated in the new system and deactivated in the source system.

7. Ask for a Temporary API Call Increase

API calls are limited each 24-hour period. During data migration, the volume of records being loaded will often exceed the API limit slowing down or even halting migration efforts.

8. Implement Data Backups

Set up daily automatic backups on both the source and target systems during the migration process.

9. Beware of Rules, Workflows, Triggers in the Target System

Often there are active workflows that send emails, and these will need to be paused during the data migration. Evaluate the source organization's use of Queues, Profiles, Public Groups, Chatter, Templates, Apex Triggers and Workflows. Specifically, identify whether to package or recreate them manually, but more importantly, identify if they are even still relevant. Many Orgs have dozens of obsolete Templates and Workflows.

10. Analyze Where Data Resides

Many fields in the source system will be populated on less than 5% of the total records. If rarely used, fields may not need to be recreated and this data will not need to be mapped. Evaluate which installed Apps are still in use in the source system. There may be many old Apps which do not need to be re-installed in the target system.

11. Cascade Inserted Data

Once the new Org is set up to receive the data, the record flow should be cascaded in the following order- Users, Accounts, Contacts, Leads, then Cases, Opportunities, Activities, Attachments, etc.

12. Consider Field Restrictions

Data cannot be mapped to a formula field (and certain other field types) and will need to be loaded into a text field. Many records have fields that default to value lists. Where relevant a value list will be re-created in the new Org. Check all value lists in the target system and ensure they are unrestricted.

When migrating code from a legacy Org, ensure the Apex classes have no hard-coded Org names or record IDs

13. User Set Up

Internal Users need to be set up first. Community Users should be set up after all data is loaded. Community Users will need to be recreated and notified of the new community location. Change any posted public links that lead to the old community location.

14. Test the Migration

Appoint two or three users to begin testing. Have these users keep a running document of notes and issues. Retain a license or two in the source (migrate) system to enable access for a period after the migration is complete.

VII. Building Effective Reports

1. Different Users Require Different Reports

Salespeople need reports to help manage their *Customers.* Sales Managers need reports to manage their *Salespeople.* Many administrators will simply clone similar reports for different users without considering the goals of the actual user.

2. Be Aware How Users Access Reports

Many users now access reports on mobile devices where the visible portion of a report is much smaller than on a computer screen. Consider creating a secondary set of reports called ‘XYZ Report – Mobile Device Version’ which show fewer columns of information than the standard ‘XYZ Report’.

3. Name Reports in Active Tense

Naming a report 'NOT REPURCHASED THIS YEAR' is more effective than simply calling it a 'Customer Sales Report'. It draws your users to the report and clearly communicates the purpose of the report. Similarly, 'MULTIPLE OFFICE VISITS BUT ZERO SALES YTD' is more effective and actionable than 'Notes on Accounts'.

4. Focus on One or Two Key Metrics per Report

Administrators sometimes attempt to fill reports with a dozen or more columns of data. This makes the report unwieldy and confusing. Decide what the specific focus of a report should be and create it with this goal in mind.

5. Each Report Should Drive a Specific Action

When the salesperson runs the 'NOT REPURCHASED THIS YEAR' report, the desired action should be obvious– a list of accounts to immediately go and see. Such a report should provide the information the salesperson needs such as the name, address, telephone number, fax, etc. Providing the report with only an account name makes it difficult for the user to take immediate action, as they will have to find the missing address or contact number in some other report.

6. Use Transaction Data Wherever Possible

Most Salesforce reports are built on information which is updated by the user. Notes and Opportunities are examples of 'user entered data'. This 'user entered data' is always subject to errors, omissions, and sometimes deliberate misinformation. Any data which can be used in a report that is based on a verified transaction is more reliable. Many companies now track salespeople's mileage using a mobile app that automatically notes every address location they stop their vehicle at. This type of transaction data can be matched to the address on a Salesforce record to tag a vehicle stop as 'an office visit' and is more reliable than hoping the salesperson makes a manual note of every prospect visit.

7. Organize Reports into Relevant Folders

Prioritize the order of report folders by putting a number in front of the folder name such as '1.1 Daily Sales Reports, 1.2 Daily Support Reports' etc. You can always reorganize the folder by changing the numbers, whereas the default is that the report folders show in alphabetical order by folder name.

8. Create a Folder for Customizing reports

If the reports you create for users are read-only, create a specific folder which contains reports that users have read-write permissions to. This confines the users to modifying only reports within this folder as opposed to making changes to reports in other folders which are widely used by others and may contain complex filters you don't want changed.

9. Be Careful with Filters

Administrators will frequently create reports using filters or multiple filters which present only partial data but may not mention this in the report name or description. Ensure that if you use filters on a report, the user is aware of exactly what the filter means and how that may limit or skew the information in the report they run.

10. Create a Group of Report Power Users

In any large group of Salesforce users, there are many highly technical users who can learn to create advanced and customized reports for themselves as well as teach their counterparts. Training specific users to instruct others in report building helps to keep the reports accurate and clean.

11. Limit the Number of Reports in Folder

Control the number of reports that are in each folder, especially if reports tend to proliferate. Folders containing dozens, or hundreds of reports are difficult to navigate. As the number of reports in a folder grows, create new folders to move certain reports into. Keep reports in each folder confined to a specific topic.

12. Purge Old and Unused Reports

It is fast and easy to create Salesforce reports. But this often results in hundreds of report folders and thousands of reports. Frequently reports are created around specific users who are no longer with the company. Ensure there is a regular process to remove old reports and report folders which have become redundant or out of date, or at the very least, move older reports and report folders to the bottom of the list by numbering the folders.

VIII. User Training

1. General Courses have Minimal Value

Canned training may not be of value. You may find courses and videos online, or direct your users to stock training courses. However, each company uses Salesforce differently. Note the objects your organization uses (Cases, Opportunities, etc. and train to those objects as you use them.

Be sure to train users how to use the mobile applications if they plan to use Salesforce on their phones or tablets. Don't assume they know anything; many new users get tripped up just attempting to install and set up the mobile interface.

2. Train in Small Doses

In some companies, the functionality can be overwhelming to a new user. Therefore, your plan should be organized into 'basic', 'intermediate' and 'advanced' user skills. For example, simply learning how to run a report would fall into basic training; customizing and exporting would be an intermediate user level skill and more complex reporting such as joined reports or creating dashboards would be an advanced level skill.

3. Use Understandable Terminology

If you have been working with Salesforce for an extended period, you likely use Salesforce terminology and acronyms which can be lost on new users. The most common confusion occurs around the discussion of an ‘Account’ record. To most people, an ‘Account’ means a customer. In Salesforce, an Account really means a *‘record’* and an ‘Account’ can be a customer or non-customer; this can really confuse new users. Other terms such as ‘objects’ are alien terms to a new user.

4. Use Peers for Training

Using an individual’s peer for training is often more effective than using a formal trainer. The peer can understand specifically what the new user will need and focus them on these features. Peers also provide more credibility to new users.

5. Develop Power Users

There are typically individuals inside the company with a high level of technical competence. These users will embrace the functionality as well as provide new ideas for feature improvements and helpful Apps to consider. Formally identifying these ‘Salesforce Power Users’ and harnessing their excitement about, and familiarity with the system can provide a team of potential training experts who are close to the new users who need training.

6. Create Online Courses

Many companies will host web sessions to train new users. These can have mixed results. The web sessions are typically 'one-way' to the user; the trainer may not be able to assess whether the training is effective. In addition, many web training calls involve many participants; there are background noises, login issues and an overall inability to determine if the user is even on the system during the training making attendance tracking difficult.

There are several low-cost hosted LMS (Learning Management Systems) available which can host narrated PowerPoint® presentations and other authoring tools. Creating a series of online courses which contain small, learnable concepts such as 'How to Create an Opportunity' or 'How to Customize Reports' allow the user to view the courses at their convenience as well as review the courses again later. The LMS system will also provide detailed tracking of who viewed the course and whether they viewed the entire course or just part of it.

IX. Recruiting a Salesforce Administrator

1. Deactivate the User Account due to Departure of a Previous Administrator

A Salesforce Administrator has full system administration-level access giving them the ability to delete all data and configurations. This presents an enormous security risk for companies if the departed Administrator is not frozen or deactivated immediately.

Salesforce is a web-based application, not an internally housed application, and companies sometimes forget that although the user may have been deactivated from all internal company systems and networks, Salesforce continues to run and be accessible over the web to all active users with a user name and password.

2. Review Workflow, Approval, Alert, Support, Lead and Queue Settings

The Administrator may have been an approver on, or recipient of, various system functions. Web leads or cases may have been routed to this key individual through automated settings and these settings may need to be updated. And ensure that any integrations that may run through this user account are updated.

3. Reassign Records Owned by Previous Administrator

Deactivating a user does not change record ownership. This means that (depending on the organizational settings) all the Lead, Contact, Account, Case and other records that may have been connected to the now departed Administrator may no longer be visible or accessible by other users.

4. Define the Job Accurately

Human Resources will frequently write job descriptions by copying other public postings. It is common to see Administrator postings asking for Developer, App Builder, Pardot, Community Cloud as well as strong Apex and Visualforce experience. Most Administrators are not Developers, and some skills are easily obtained; with each new credential demanded, you are limiting your respondents.

5. Determine What the Job Really Requires

Salesforce Administrators wear a variety of hats; technical expert, training leader, marketer, business analyst, even project manager. Outside of the technical skills required, each of these tasks demands different personality types.

6. Identify How Salesforce is Being Used

Companies using Salesforce may be at various levels of adoption; complete newbies to the system, experienced users, or struggling with a configuration that no longer works. Different skill-sets and personalities are required in each phase. In addition, the organization may be using a variety of Salesforce applications and many integrated apps with heavily customized code built by others who are no longer involved.

7. Respond Quickly to Candidates that Apply

The number of companies utilizing Salesforce continues to increase creating a large demand for this key individual. Companies will spend thousands of dollars on recruitment advertising only to let the applications sit unopened.

8. Interview and Hire Quickly

The current expanding economy has presented an environment of very low unemployment. ‘True’ (and qualified) candidates will experience multiple, competitive offers. Sometimes being ‘first’ is more important than offering the highest compensation. For this reason, companies should ensure they respond to candidates and schedule interviews quickly; internal decision-making should be efficient and generating new hire offer paperwork speedy.

9. Consider Outsourcing Your Administrator Needs

Our research at Snowforce, has found that the average salary for an experienced Salesforce Administrator in Los Angeles is $78,791. With benefits included, the total cost to a company is $103,531 annually (not including recruitment fees and training).

10. Outsourcing Provides Continuity

Many companies have experienced a ‘revolving-door’ of Salesforce Administrators for a variety of reasons; the position is often a springboard to other positions that may emerge inside the company but more commonly the turnover occurs because as the Salesforce Administrator gains experience and additional credentials, he or she becomes actively recruited elsewhere. Every time a new Salesforce Administrator leaves, a tremendous amount of corporate knowledge leaves with them, and there can be a very long learning curve for a replacement hire.

11. The Evolution of Managed Services

It is now possible to find outside resources to manage your Salesforce system on an ongoing basis. While previously many IT providers would provide network management it was difficult to find any who would take on day to day management of Salesforce.

At Snowforce, we have built our entire business around day-to-day Salesforce system management. We view ongoing administration as the critical element to Salesforce success and adoption.

12. The Role is a Learning Role

70% of the role will be about understanding your business processes. The Salesforce Administrator will need to truly understand the business, to provide real value. Learning each department's business processes and routines helps to create a great system. And as these processes change and evolve, the Administrator will need to modify the system.

13. Ongoing Education is Critical

Your Salesforce Administrator will need to continually learn about new features, functionality and releases. Investing in their Salesforce-related skills is critical. In addition, your Salesforce system will likely be very different than the system they may have previously managed, and in an industry or business that will be completely new to them.