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Achieve Outstanding CRM Administration

Abstract

With software as a service (SaaS), systems administration is much easier than with traditional on-premise software. Still, making sure you have the right administration resources—using either your employees or salesforce.com's services—will be key to your success.

Because salesforce.com takes care of many traditional administration tasks, systems administration is easier than ever. Setting up and customizing the application, training users, and "turning on" new features with each release are all just a few clicks away. The person responsible for these tasks is your Salesforce CRM administrator.

This person will be one of the most important resources in making your implementation—and your day-to-day utilization once your application is live—a success. That's why it's important to carefully choose your administrator and continually invest in his or her professional development. You can also choose to have salesforce.com handle administration tasks for you.

Note: Larger enterprises often use a role called Business Analyst or Business Application Manager as well, particularly when planning an implementation and ensuring widespread adoption once the solution is live. Although common customization tasks usually don't require coding, you may want to consider using a professional developer for writing Apex Code, developing user interfaces with Visualforce, or completing complex integration or data migration tasks.

In many ways, the CRM administrator fills the role played by a traditional IT department: answering user questions, working with key stakeholders to determine requirements, customizing the application to appeal to users, setting up reporting and dashboards to keep managers happy, keeping an eye on availability and performance, activating the features in new releases, and more. This paper will help you make important choices when it comes to administering your Salesforce CRM application, including how to:

- Find the right person(s)
- Invest in your administrator(s)
- Provide adequate staffing
- Get administration help from salesforce.com

Find the Right Administrator

Who makes an ideal Salesforce CRM administrator? Experience shows that successful administrators can come from a variety of backgrounds, including sales, sales operations, marketing, support, channel management, and IT. A technical background may be helpful, but is not necessary. What matters most is that your administrator is responsive to your users and thoroughly familiar with your business and the customization capabilities of Salesforce CRM. Here are some qualities to look for in an administrator:

- A solid, holistic understanding of your business processes
- Knowledge of the organizational structure and culture to help build relationships with key groups
- Excellent communication, motivational, and training skills
- The desire to be the voice of the user in communicating with management
- Analytical skills to respond to requested changes and identify customizations needed

Invest in Your Administrator

An administrator who is thoroughly familiar with Salesforce CRM can ensure that your data is safe, your users are productive, and you get the most from your solution.

Salesforce.com offers both self-paced training and classroom training for administrators.

- For a list of free, self-paced courses, go to Salesforce.com Training & Certification.
- To ensure that your administrator is fully trained on all aspects of security, user management, data management, and the latest Salesforce CRM features, enroll your administrator in ADM 201 Administration Essentials. The price of this course includes the cost of the certification exam to become a Salesforce.com Certified Administrator.
- For experienced administrators, salesforce.com offers ADM 301 Advanced Administration to learn how to manage data, enhance end-user productivity, and expand a Salesforce CRM implementation. The price includes the cost of the certification exam to become a Salesforce.com Advanced Certified Administrator.

Provide Adequate Staffing

The number of administrators (and, optionally, business analysts) required depends on the size of your business, the complexity of your implementation, the volume of user requests, and so on. One common approach for estimating the number of administrators you need is based on the number of users.

Number of Users	Administration Resources
1–30 users	< 1 full-time administrator
31–74 users	1+ full-time administrator
75–149 users	1 senior administrator; 1 junior administrator
140–499 users	1 business analyst, 2–4 administrators
500–750 users	1–2 business analysts, 2–4 administrators
> 750 users	Varies, depending on a variety of factors

In addition to the user base, you should also consider the following:

- **Full- or Part-Time Administrator –** In small businesses, the role of CRM administrator is often not a full-time position. In the initial stages of an implementation, the role requires more concentrated time (about 50 percent). After go live, ongoing management requires much less time (about 10–25 percent).
- **Separate Administrators –** If you have several business units that use Salesforce CRM solutions—such as Sales, Marketing, Support, and Professional Services—consider using separate administrators for each group, who will spend from 50–100 percent of their time supporting their assigned solutions.
- **Delegated Administrators –** Another common practice for large implementations is to use delegated administrators for specific tasks such as managing users or custom objects and building reports.
- **Regional Administrators –** If you operate in several geographic regions, consider using one administrator for each major region, such as North America, EMEA, and APAC. To decide how to classify regions, consider whether they have distinct currencies, languages, or business processes, and then train your administrators in Salesforce CRM's multicurrency and multilanguage features. Also appoint a lead analyst or administrator who will coordinate the various regions.
- **Developer(s) –** If you need customization beyond the metadata (click not code) capabilities of Salesforce CRM or want to develop new applications, you may also need a developer to create, test, and implement custom code.
- **Backup Administrator(s) –** Identify backup administrators and encourage them to keep their skills current. Consider scheduling one backup administrator's time at approximately 10–25 percent of one full-time employee's time.

Get Administration Help from Salesforce.com

Do you have resource constraints or do you want to implement significant functionality as quickly as possible? Consider salesforce.com's Premier Support plus Administration offering. It's systems administration as a service. You get a dedicated administrator to handle ongoing application maintenance, post-deployment application reconfiguration, and new functionality design.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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