

Getting the right (number of) Admins

Salesforce Success Services
Achieve Outstanding CRM Administration

Because Salesforce takes care of many traditional administration tasks, system administration is easier than ever before. Setting up, customizing the application, training users, and “turning on” the new features that become available with each release—all are just a few clicks away. The person responsible for these tasks is your Salesforce CRM administrator. Because this person is one of the most important resources in making your implementation a success, it’s important to carefully choose your administrator and to continually invest in his or her professional development. You can also choose to have Salesforce handle administrator tasks for you.

Note: Larger enterprise implementations often use a role called Business Analyst or Business Application Manager as well, particularly for planning the implementation and ensuring adoption once the solution is live. Although the most common customization tasks don’t require coding, you may want to consider using a professional developer for some custom development tasks, such as writing Force.com code (Apex), developing custom user interfaces with Force.com pages (Visualforce), or completing complex integration or data migration tasks.

In many ways, the administrator fills the role played by traditional IT departments: 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 much more. This paper will help you to make important choices when it comes to administering your Salesforce CRM application, including:

- Finding the right person(s)
- Investing in your administrator(s)
- Providing adequate staffing
- Getting help from Salesforce
- Find the right administrator

Who would make 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 thoroughly familiar with the customization capabilities of the application and responsive to your users. Here are some qualities to look for in an administrator:

- A solid understanding of your business processes
- Knowledge of the organizational structure and culture to help build relationships with key groups
- Excellent communication, motivational, and presentation skills

The desire to be the voice of the user in communicating with management
Analytical skills to respond to requested changes and identify customizations
Invest in your administrator

Investing in your administrator will do wonders for your Salesforce CRM solution. With an administrator who is thoroughly familiar with Salesforce CRM, you'll ensure that your data is safe, your users are productive, and you get the most from your solution.

Salesforce offers both self-paced training and classroom training for administrators. For a list of free, self-paced courses, go to Salesforce 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, enrol your administrator in Administration Essentials (ADM201). The price of this course includes the cost of the certification that qualifies your administrators to become Salesforce.com Certified Administrators. For experienced administrators, Salesforce offers the Administration Essentials for Experienced Admins (ADM211) course.

Providing 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	Depends on a variety of factors

In addition to the user base, also consider the points below:

In small businesses, the role of the administrator is not necessarily a full-time position. In the initial stages of the implementation, the role requires more concentrated time (about 50 percent). After go-live, managing Salesforce CRM day to day requires much less time (about 10–25 percent)

If you have several business units that use Salesforce CRM solutions—such as sales, marketing, support, professional services, and so on—consider using separate administrators for each group, to spend between 50–100 percent of their time supporting their solutions.

Another common practice for large implementations is to use “delegated administrators” for specific tasks such as managing users, managing custom objects, or building reports.

If you operate in multiple 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 a distinct currency, language, business processes, and so on, and train your administrators in the multicurrency and multilanguage features. Also appoint a lead analyst or

administrator who will coordinate the various regions.

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.

<https://help.salesforce.com/HTViewSolution?id=000007548>

Revision #2

Created 2019-08-30 09:23:37 UTC by Windyo

Updated 2023-09-19 03:55:23 UTC by thejamesjames