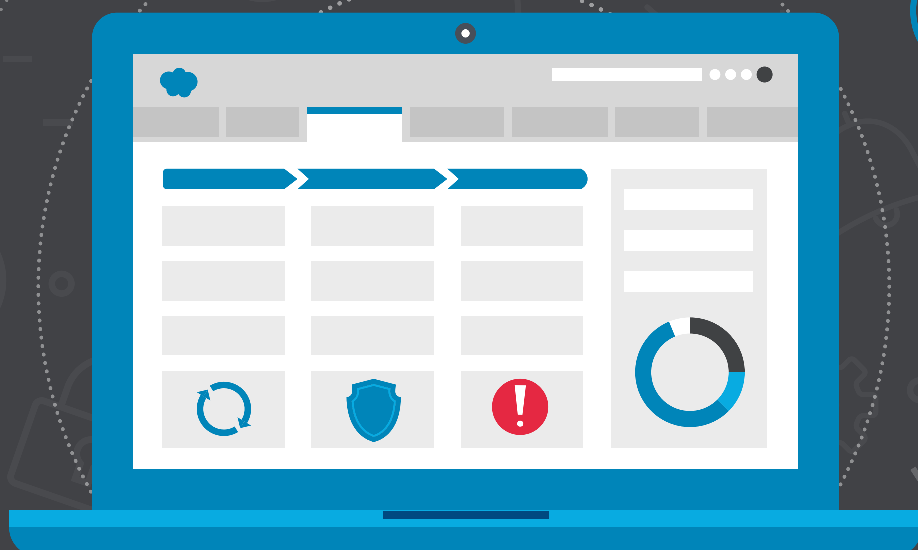
HOW TO

Eliminate Salesforce Maintenance Headaches



CloudKettle

When it comes to Salesforce, high-growth companies almost always face a similar set of challenges caused by the chaos of their rapid expansion.

Typically these challenges are related to a combination of **3 forces**:

1

Expanding Headcount

Teams begin to expand and new departments are created. This increase in headcount translates into more bodies interacting with Salesforce on a daily basis. More activities need to be logged, data cleansing needs to be monitored more carefully for accurate forecasting, and permission sets need to be added and adjusted as new managerial structures are introduced.

2

Workflows and Processes

Increase in headcount also means new workflows and processes are needed and existing ones need to be adjusted. Whether it's notifications on key milestones like new deals closed, or introducing Approval Processes; as the number of users in Salesforce increases so does the opportunity to leverage automation for efficiency. With all the moving parts, often new automation is added before an inventory of what currently exists is examined to delete workflows and processes that are no longer used.

3

Increase in 3rd Party Integrations

As organizations grow they are faced with a buy or build decision in order to scale. Many companies opt to use 3rd party vendors who are experts in their particular area. Over time, more and more 3rd party tools are installed in Salesforce as it grows as the System of Record for the organization. While this helps to centralize data and processes, it also means there's a tremendous amount of data being passed between these systems.

As an organization adds users, automation, and 3rd party platforms, the complexity of managing Salesforce skyrockets. Most organizations hit a point where the sophistication of their Salesforce ecosystem necessitates a dedicated Salesforce resource. It's important that Salesforce projects and maintenance are managed holistically by a person or team that understands all competing priorities across the organization.

If everyone “owns” Salesforce then nobody owns Salesforce.

With multiple Admins working independently of one another, changes made in the Salesforce instance at the departmental level can effect the entire organization.

Dedicated Salesforce Resource

A mistake companies often make is they appoint an “Admin” in each department and all those Admins work independently of one another. This is a mistake because each Admin will make changes reflective of their unit’s needs without consideration or knowledge of the other changes happening in Salesforce.

To avoid issues caused by changes being made at a departmental level without thinking of the overall corporate instance, a dedicated resource needs to be appointed to filter and manage all these requests.

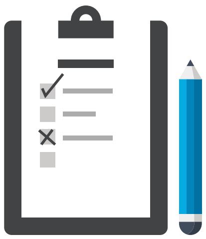
At some point, a certified Salesforce Admin(s) gets hired to manage the organization’s Salesforce needs, but until that time this role typically falls to Marketing Operations or Sales Operations, because generally those units are responsible for managing marketing leads and sales processes.

Depending on the size of your organization, that dedicated resource could range from a full-time Salesforce Admin(s) to a Sales Ops team member spending 30% of their week on Salesforce maintenance & requests. Whatever that looks like for your company; taking a proactive approach to managing Salesforce is critical.

Carving out time for proper planning as well as actively monitoring key areas allows your Salesforce resource(s) to stay ahead of organizational demands and spot potential problems areas before they become larger issues.

Planning for Salesforce Success

Developing a Salesforce Success Strategy is your first step to success. Similar to a marketing plan, creating a Salesforce Success Strategy helps prepare your organization for growth. Creating a plan can be time-consuming but it's critical to understanding departmental needs and facilitating future success.



Meet with each department to properly understand their data needs.

Needs of Today

Start by taking inventory of your organizational needs and how you're currently leveraging Salesforce. As the CRM is used across the organization, there are many people accessing and manipulating data. All of whom have their own unique business requirements. Meet with each department to properly understand what kind of data they need to access, the purpose behind accessing that data, as well as what information is missing that would be helpful. Beyond documenting departmental needs, this process should also help uncover inefficiencies and opportunities for automation.

Needs of Tomorrow

When meeting with each department, also investigate what the future looks like for each of those business units. What does headcount look like and what are all the demands associated with adding team members? Are there new projects on the horizon that will require new Salesforce functionality?

Scheduled Release Process

Similar to how most development teams have release schedules, internally there should be a Salesforce release schedule. Scheduling releases will save time and set expectations that all major updates will happen on a monthly cadence. This will also allow all incoming requests to be prioritized and visible across the organization. This way, everyone understands what will be completed as part of a monthly release vs what will be prioritized in a Salesforce backlog.

Create a monthly internal Salesforce release schedule.

Creating a monthly release schedule will also help facilitate regular departmental meetings which act as a pulse check on how urgent outstanding requests actually are. Sometimes priorities will stay the same, but for the most part they change. For example, maybe the critical installation of new software for the Marketing department isn't important anymore as they've shifted their focus.

3 Things Every Organization Should Monitor in Salesforce

Once you have identified who internally owns Salesforce and a have Salesforce Success Strategy, the next step is focusing on decreasing preventable errors by monitoring Salesforce. The following three areas should be monitored to ensure Salesforce is functioning optimally.

1

Installed Packages

With 3,000+ packages available for download on the Salesforce AppExchange, there are more platforms available than ever before to help optimize and extend the power of Salesforce. Whether the installed package is a free or paid solution, maintaining the performance of these integrations is key to your Salesforce ecosystem's health.

Many installed packages sync with Salesforce, passing data in and out of your Org. Often what we see causes a sync to break between Salesforce and a 3rd party platform is a seemingly inconsequential change. For example, an employee updates their password which generates a new security token and causes any integrations using that login to fail.

> Often a seemingly inconsequential change, like an updated password, is the cause of a sync error between Salesforce and a 3rd party platform.

What these errors often have in common is they take time to flag internally. For example, it could be twenty-four hours before someone realizes the Marketing Automation platform and Salesforce are no longer syncing. This means a day of leads not being worked—causing your company to miss out on valuable sales opportunities and, ultimately, revenue.

2

User OAuth

As the number of platforms we use daily to do our jobs increases, so are the number of platforms employing User Authentication (User OAuth). This makes for a seamless and easy experience for the employee—they use their Salesforce login credentials to gain access to platforms like Slack, SalesLoft, LinkedIn Sales Navigator, and others.

However, this opens your organization and Salesforce instance up to risk. Each third-party platform granted access to Salesforce via one of your employee's login credentials immediately increases the risk and liability of a data breach(es).

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This is a particularly important concern for publicly traded companies, organizations that are HIPAA compliant, and companies that have exposure to regulations like GDPR. Ensuring only third-party vendors who have properly been vetted have access to your Salesforce org is key to managing data integrity.

BEST PRACTICES

1. Salesforce Administrator(s) vet and approve any 3rd party tools before they are granted access.

2. Systems are in place to prevent end users from authorizing access and as a failsafe, monitoring for any new integrations that do appear in the Org.

3

API Call Limits

B2B SaaS companies have a lot of data being passed between Salesforce and 3rd party applications. This means, managing your instance's daily API call limit is important.

As more packages are installed in your Salesforce instance, the strain on your daily API limit increases. This is especially true for integrations like Marketing Automation and Data Enrichment platforms which tend to have high API call intensities.

> Integrations can't sync with Salesforce once you've hit your daily API limit. For many companies, that means revenue impacting consequences.

Once you've hit that daily API limit, all your integrations can be impacted; no longer able to sync with Salesforce, trapping data in silos. Which, for a lot of companies, means revenue impacting consequences.

Continuous API call monitoring is key to ensuring if something does begin to escalate your call number you are able to react in time to put a solution in place before your ecosystem freezes, keeping your 3rd party solutions running smoothly.

Need Help?

Have questions about Salesforce strategic planning or how to monitor your Salesforce instance 24 hours a day? Reach out today. We love helping high-growth B2B SaaS companies with Salesforce strategic planning.

If you enjoyed this read you may also like our blog post on How Salesforce Powers the Revenue Stack and Renewals.

