Maintaining Salesforce on a Budget? 8 Things You Should Monitor

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In times of economic downturn, maintaining business critical systems can be a target for cost-cutting measures, especially when the perception is that a full-time resource isn't necessary.

2020 has been hard for every business. We have seen an impact on Salesforce support that has organizations questioning whether they can simply "get by" with their current set-up. Perhaps, but that assumes your organization has come to a halt as well, with no employee turnover, or change in business processes!

Whether it's **Sales**, **Service**, or **Marketing Cloud**, it's essential to keep a healthy, user-friendly system in operation that doesn't dissuade sales, marketing, and customer service reps to dis-engage from using such a vital component. A stale Salesforce install can be your Achilles heel once you have acclimated to your next normal, or start growing once again.

Possible reasons your Salesforce investment may be vulnerable to neglect:

- (!) Reduction in force or furlough

- (!) Re-assigning trained Salesforce staff for new and immediate needs

- (!) Cutting budget means cutting or reducing partner contracts

- (!) Expiring partner contracts that for various reasons may not get renewed

These situations can have a major impact on your Salesforce system and ultimately, your business processes. Smartbridge has put together a key list of the top 8 things you should be paying attention to when maintaining Salesforce on a budget. This will ensure that you are making the most with what you have and nothing falls through the cracks.

01

Salesforce Changes 3 Times a Year

Salesforce delivers new innovative features to users 3 times a year during their seasonal releases: **Winter**, **Summer**, and **Spring**. With each release comes new updates and features. These enhancements empower users with more efficient ways to perform daily tasks. However, they can sometimes cause existing functionality to fail or behave unexpectedly. You should monitor these releases and review their impact on your organization.
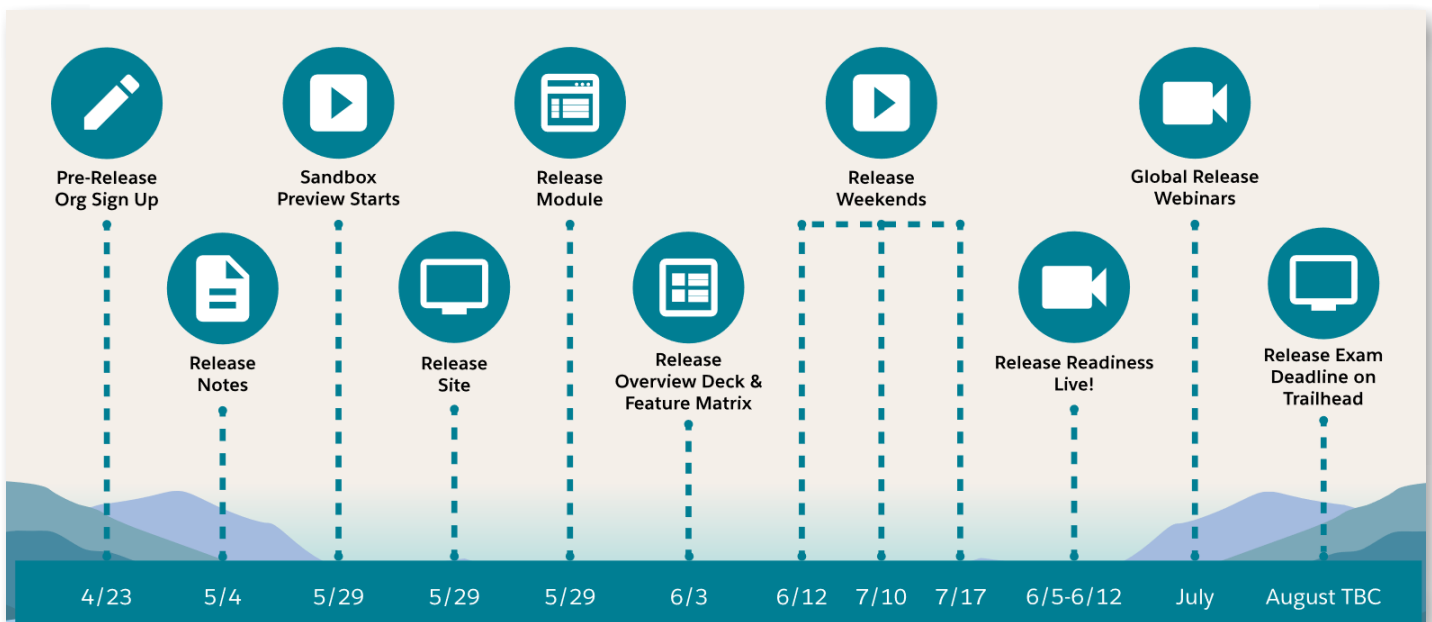
Examples of a new release affecting business processes:

- When the new mobile app was released, its design revolved around the cell phone experience. Navigation was redesigned, taking cues from other popular apps. It needed admins to enhance Lightning pages to completely take advantage of the new UI. However, this change left tablet app users with an inefficient UI.

- In the recent Winter '20 release, the Desktop Flow Designer hit the end of the line. Flows built using this were no longer running and received an error when the user tried to open them.

What Can You Do to Prepare?

→ Use the Salesforce Trust website to track upcoming releases

→ Use the Release Readiness Trailblazers Community and other Salesforce sources to understand all the options for preparation

→ Test upcoming changes in Preview Sandbox. Verify if your Sandbox has access here

→ Communicate early and train users on new features

Example of Summer release preparations

| Pre-Release Org Sign Up	Release Notes	Sandbox Preview Starts	Release Site	Release Module	Release Overview Deck & Feature Matrix	Release Weekends		Release Readiness Live!	Global Release Webinars	Release Exam Deadline on Trailhead
4/23	5/4	5/29	5/29	5/29	6/3	6/12	7/10 7/17	6/5-6/12	July	August TBC

02

Business Will Change

No matter what the circumstance, a business will always change. Be it periodic operational changes, mandatory changes for compliance, or creative process enhancements, these changes almost always result in system updates/enhancements. Salesforce admins must be prepared to meet the demand for the changing business scene.

For example, if the organization or territory structure changes, the corresponding configuration needs to be updated in Salesforce.

As sales team responsibilities change, users assigned to a territory or account must be updated in the system by an admin.

In difficult times, organizations come up with creative ideas to reduce costs, recover lost business, or safely reopen. Here are a couple of examples

→ Leveraging Salesforce to keep track of which customers are allowing visitors into their facilities. This will immensely help sales teams plan their field visits and activities.

→ COOs might add a command center to Salesforce to monitor return to work and assess employee wellness. This will allow them to reopen safely and protect the health of employees.
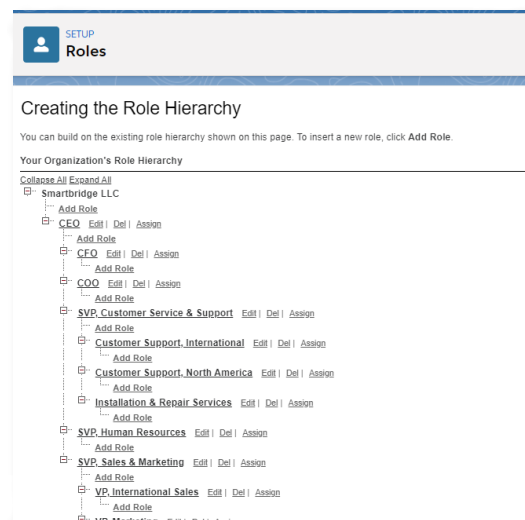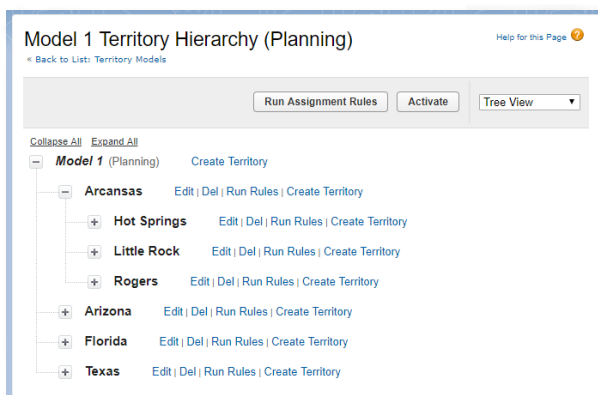
03

System Limits Monitoring

Salesforce has various system limits that require close monitoring. Neglecting these limits could lead to issues and system breakdowns. The number of licenses used, file storage limits, data storage limits, and API call limits are just a few examples out of hundreds that could cause issues if left unmonitored.

There are many more limits to watch out for at the object level. A Salesforce admin can monitor several system limits in the Salesforce System Overview section.

This is standard System Overview page. To access the System Overview page, from Setup, enter System Overview in the Quick Find box, then select System Overview.
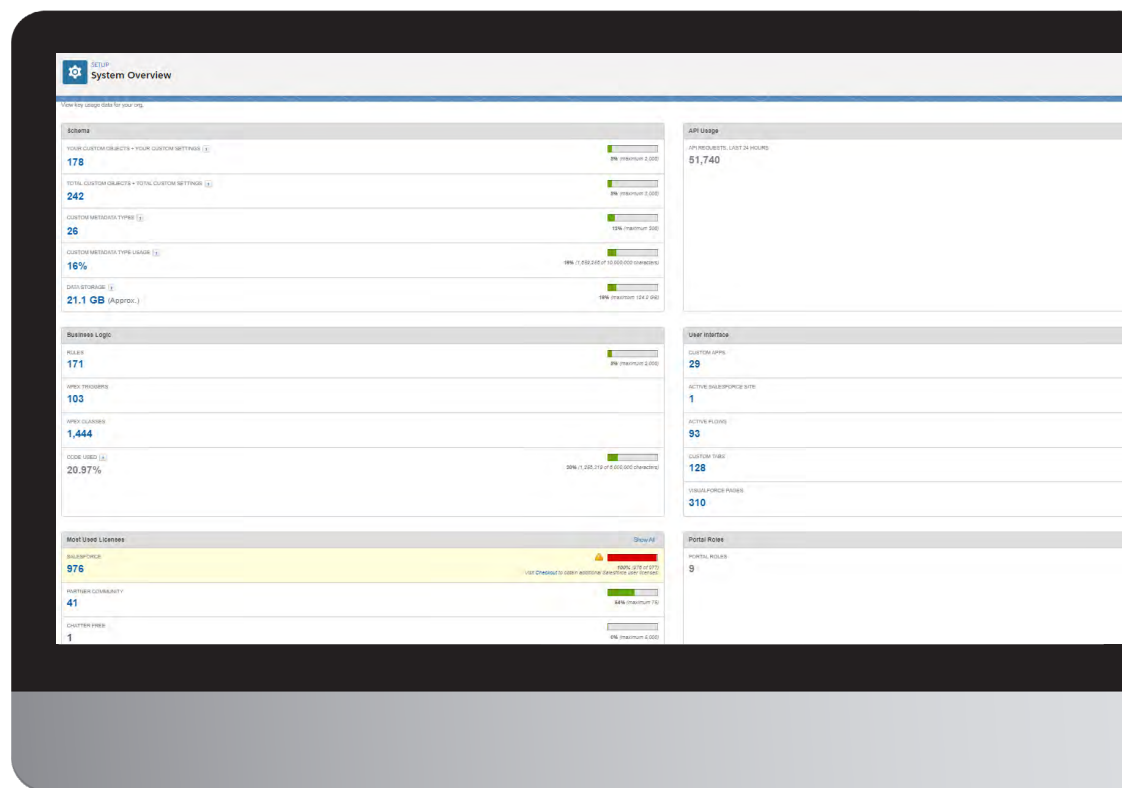
04

Data Management

Salesforce users can easily export data *out of* Salesforce, but you will need an administrator to assist with mass data load *into* Salesforce. There are many reasons you will need to periodically load/edit data in bulk in Salesforce.

- Mass changes, due to sales strategy
For example: there is a change in the structure of your account targets, so you would like to update all Tier 1 accounts to Tier 2 now.

- Mass upload of market research data

- Enhanced data governance procedures
For example: lead source is now a mandatory field. You will need to update all historical leads with a default lead source value so the system does not complain every time you edit an old record.

- Data quality/cleansing
For example: fix badly formatted addresses or missing industry type value.

- Compliance with security standards and regulations. Adhering to laws (such as HIPAA, GDPR, CCPA, and others) may require mass data cleansing, purging, and communications with your customers. The laws change quickly and they need to be addressed - not having someone maintaining Salesforce full-time is no excuse to not comply.

> **TIP**
> Salesforce administrators use Data Loader or Salesforce data import process to mass load data into the system from external sources.
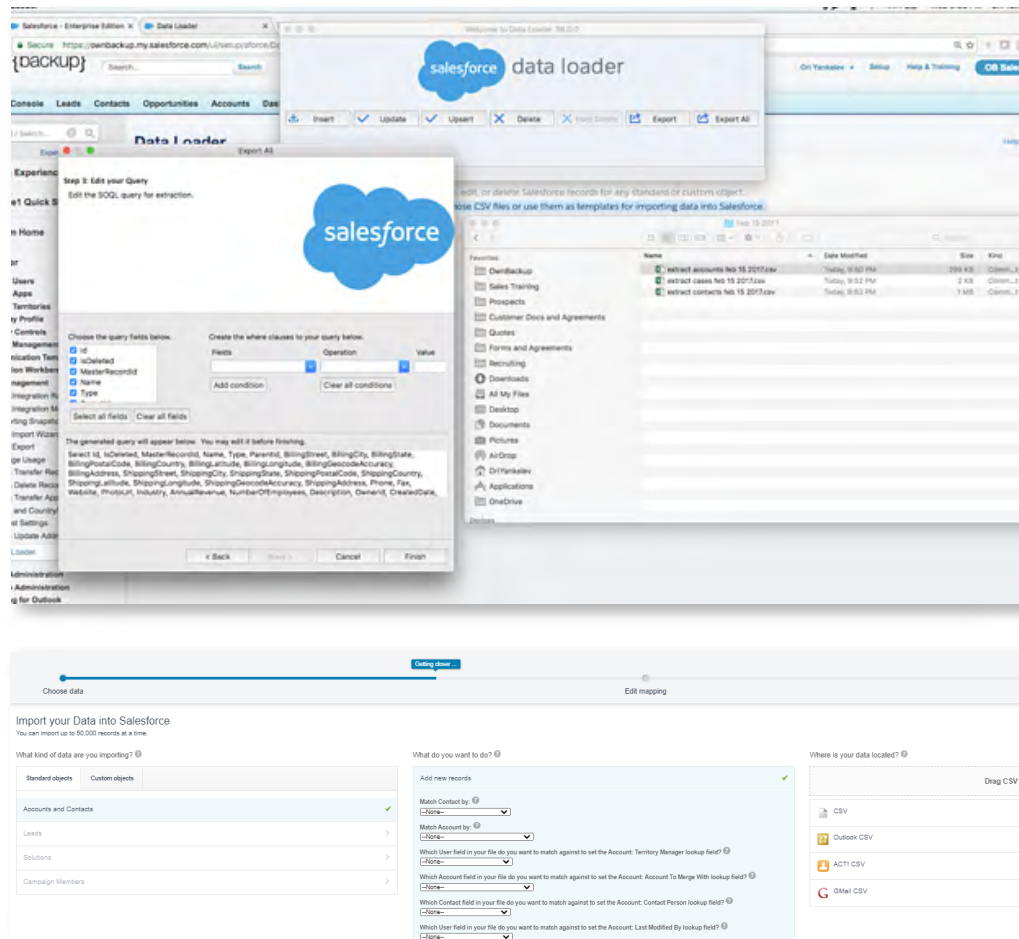
05

Reporting

Salesforce is all about data and is used to give your business the best insights to tackle major or common business hurdles. No organization can foresee all reporting needs upfront. There is a constant need to build/change reports to be able to view and understand the data available in the system. Here are a few examples of why a report may need to be changed or created:

- Weekly reports on opportunities, case closures, or other critical departmental KPIs that are sent to management can often break automatically without notice. Or, more commonly, management has a change request on what data they see in their emails, how it shows up, or perhaps how frequent.

- Reports that rely on user data, like which sales reps are out-performing the other this quarter, may have diminished value if they are still showing data from users that left the organization, or haven't been reassigned.

- Management often requests reports, or simple email notifications, that are based on particular triggers. How will you assess the feasibility or priority of these needs?

Salesforce Report Builder
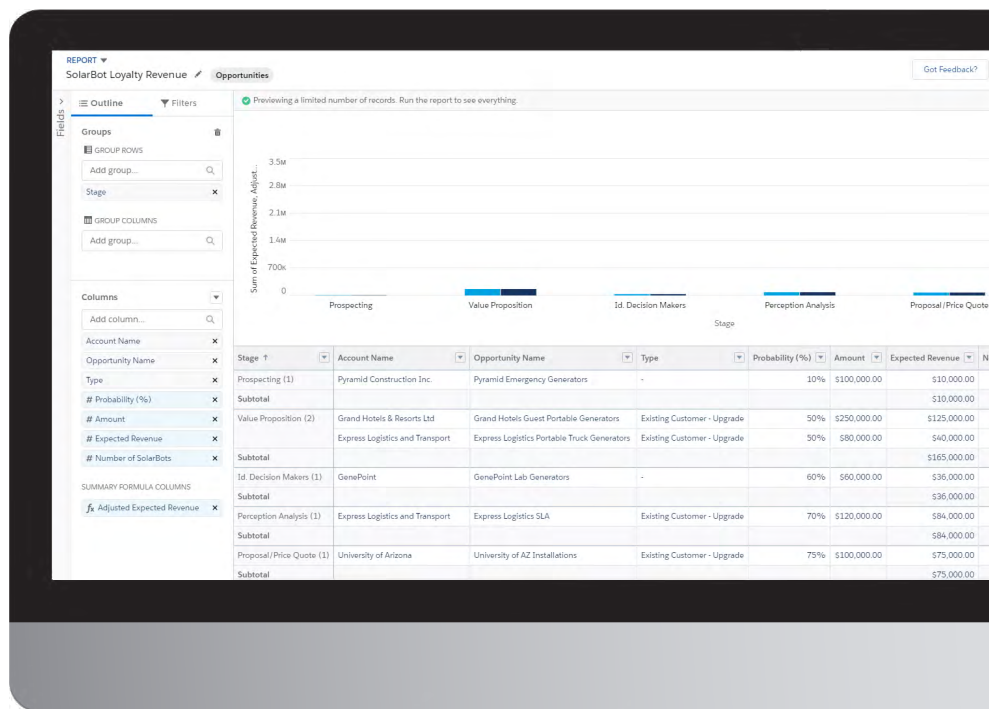
06

User Security

User maintenance is an ongoing process as users come and go all the time. You will need an administrator's help to complete regular user maintenance tasks such as adding a user, disabling a user, resetting passwords, etc.

Adding Users
Assuming your organization is already setup to take advantage of Salesforce's comprehensive security model using roles, profiles, and permission sets, adding a new user to the system is an easy task. An admin simply needs to determine the user's role in the organization, which in turn determines their permissions.

Removing Users
During the off-boarding of an employee, one of the immediate actions to be taken should be disabling the user. Waiting can put your company's intellectual property in jeopardy. Often in sales, professionals that are leaving may likely not stay for two weeks, but leave immediately, given their role and the risk of keeping a departing sales rep may bring. Without that two week warning, someone needs to always be on their toes to manage user access.

When users leave, typically, some records need to be reassigned to other users or risk neglecting relationships. If the user leaving is a superuser/administrator, there may be system processes running with their account. They need to be updated to use a different user account. To mitigate the security risk while researching replacement user accounts, "Freeze" the user account first. This restricts the user from logging in without completely deactivating the account.

TIP
Smartbridge can help you understand how to leverage SSO integration and auto deprovisioning of users when a user account is deactivated in Active Directory.

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Process Maintenance

The true power of Salesforce is in its ability to automate business processes. Salesforce Enterprise edition allows 2000 active processes in an organization. Most organizations have tens of processes running in the background doing simple to advanced automation tasks. For example:

- When an opportunity stage is updated, a task is created and sales rep is assigned

- A deal is routed through a multi-level approval workflow

These processes can be built using Salesforce Lightning Flow tools. However nothing is perfect, and they are bound to experience exceptions that result in process failures at times. But have no worries, these errors will trigger emails to admins so they can review and take corrective action.

Error element myDecision (FlowDecision).
The flow failed to access the value for myVariable_current.Country__r.Name because it hasn't been set or assigned.

Flow Details
Flow API Name: XXXXXXXXXXXXXXXXXXXXXX
Type: Record Change Process
Version: 15
Status: Active
Org: XXXXXXXXXXXXXXXXXXXX

Flow Interview Details
Interview Label: US_EU_Deals_Processes-15_InterviewLabel
Current User: XXXXXXXXXXXXXXXXXXXX
Start time: 4/10/2020 10:54 AM
Duration: 0 seconds

How the Interview Started
Amir Hamid (0050X000009ToSU) started the flow interview.
Some of this flow's variables were set when the interview started.
myVariable_old = null
myVariable_current = Deals__c (a2v1X000000JNZoQAO)

Error element Sharing_Record (FlowRecordCreate).
This error occurred when the flow tried to create records: REQUIRED_FIELD_MISSING: Required fields are missing: [CaseId, UserOrGroupId]. You can look up ExceptionCode

Flow Details
Flow XXXXXXXXXXXXXXXXXXXXXXXXX
Type: Autolaunched Flow
Version: 3
Status: Active
Org: XXXXXXXXXXXXXXXXXXXXXXXX

Flow Interview Details
Interview Label: US Requests Share With Creator 4/15/2020 3:37 PM
Current User: Salesforce Administrator 4 (0050X000009ToSU)
Start time: 4/15/2020 3:37 PM
Duration: 0 seconds

How the Interview Started
Salesforce Administrator 4 (0050X000009ToSU) started the flow interview.

FAST LOOKUP: Get_Owner
Find all User records where:
Id Equals {!userId} (null)
Store the values of these fields in Get_Owner: Id, ManagerId
Result
Failed to find records.

FAST LOOKUP: Get_Existing_Sharing_Records
Find all CaseShare records where:
CaseId Equals {!caseId} (null)
UserOrGroupId Equals {!userId} (null)
Store the values of these fields in Get_Existing_Sharing_Records: Id, UserOrGroupId, CaseId
**Result**
Failed to find records.

08

User Adoption

The line in the sand between successful and failed user adoption is the act of proactive monitoring and management. By monitoring your user activity, you can identify high performers and use them as a benchmark to help other users enhance their own usage and adoption. Look at time and quality of use to reveal users who need training, or perhaps don't need a license at all.

REMEMBER
User training is not just limited to new users. You will also need to train existing users in case of new Salesforce features, process changes, or simply a refresher for inactive users. Relevant training tailored to a specific audience significantly helps with user adoption.
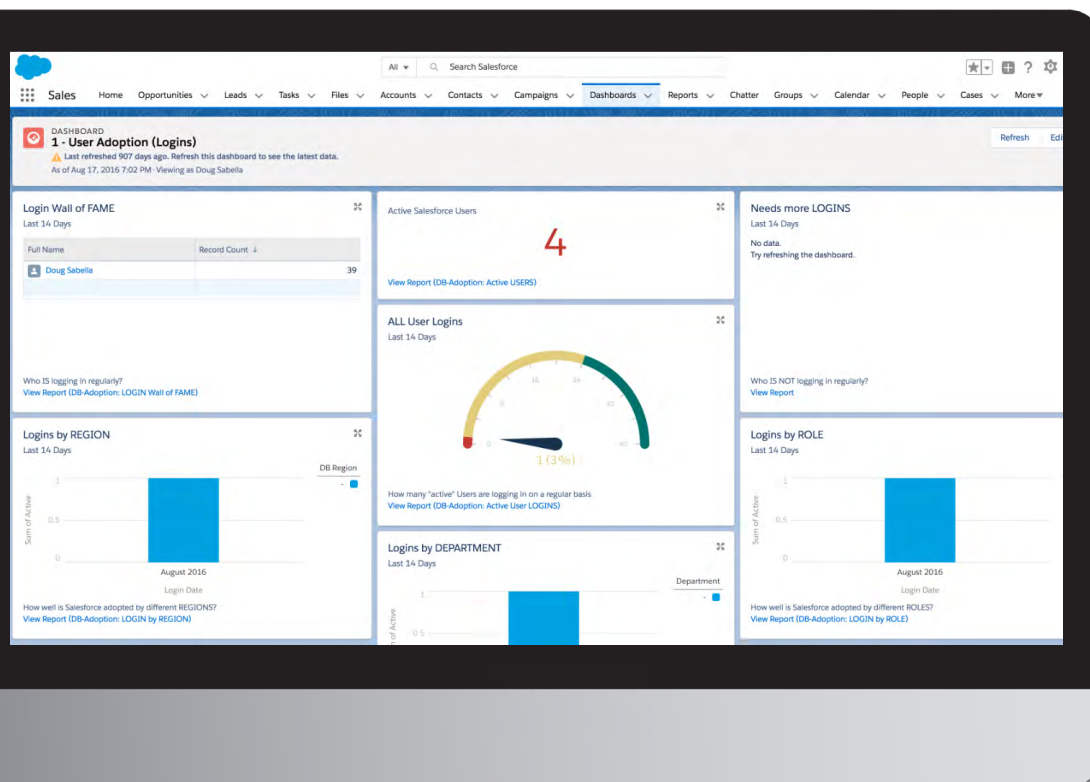
Use Salesforce Adoption Dashboards, a free App Exchange Tool, as a starting point to your adoption monitoring process.

Smartbridge

About Smartbridge

Smartbridge focuses on simplifying business transformation. We apply thought leadership and innovation to bring our customer's digital agenda to reality.

We partner with customers in their journey from vision to adoption, and across the plethora of technology options available today. Smartbridge's comprehensive list of technology and software partnerships gives us the freedom to remain an objective collaborator with our customers. The suite of Smartbridge services includes **Digital Innovation**, **Systems Modernization**, **Applications Integration**, **Data & Analytics**, **Automation**, and **Custom Application Development**.

An empathetic approach to understanding customer challenges is bred into the Smartbridge culture. It is evidenced by our ability to bring ideation to life for customers and ourselves. As thought leaders with a track record of successful project execution, Smartbridge is committed to fueling your innovation.

Salesforce Services

Smartbridge Salesforce certified experts are backed by decades of experience in implementing and maintaining core enterprise systems. With our deep expertise in custom application and integration development, Smartbridge is uniquely positioned to help customers with complex CRM implementations.

We help our customers with the Salesforce platform from beginning to end with a full range of services:

- **Assessment, Health Check And Remediation**
- **Implementation**
- **Integrations**
- **Lightning Migration**
- **Support & Maintenance**
- **Robotic Process Automation**

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