The New Salesforce Administrator Learning Journey

Collier

Introduction

This guide is intended to support new Salesforce administrators working with nonprofits or social enterprises. If that doesn't describe you, please close your browser, turn off your computer, and run far, far away.

But if you're up to the challenge of learning how one of the world's leading technology platforms can enable organizations to track their activities, measure their impact, and communicate more effectively with their stakeholders, you've come to the right place.

Before diving in, a disclaimer: none of this is easy. I generally distrust most of the sales language Salesforce and other technology platforms use to describe how their platforms are "changing the world." Technology doesn't solve problems - people do. This guide is designed to help you build your Salesforce skills so you can use this tool to solve problems and move past the inevitable resistance you're going to encounter.

This guide is written for the following audiences:

- Staff at nonprofits who serve as their organization's on-site Salesforce administrator (admin) or "power user"
- New admins who only have a portion of their time to devote to Salesforce
- Admins working at organizations using Salesforce to support their fundraising, programs, or marketing / communications processes
- Managers who supervise staff who fits one of the descriptions above

Please share this information with anyone you feel would benefit. If you'd like to learn more about my experiences or contact me, check out the About the Author section at the end of this guide.

Warmly,

Paul Collier

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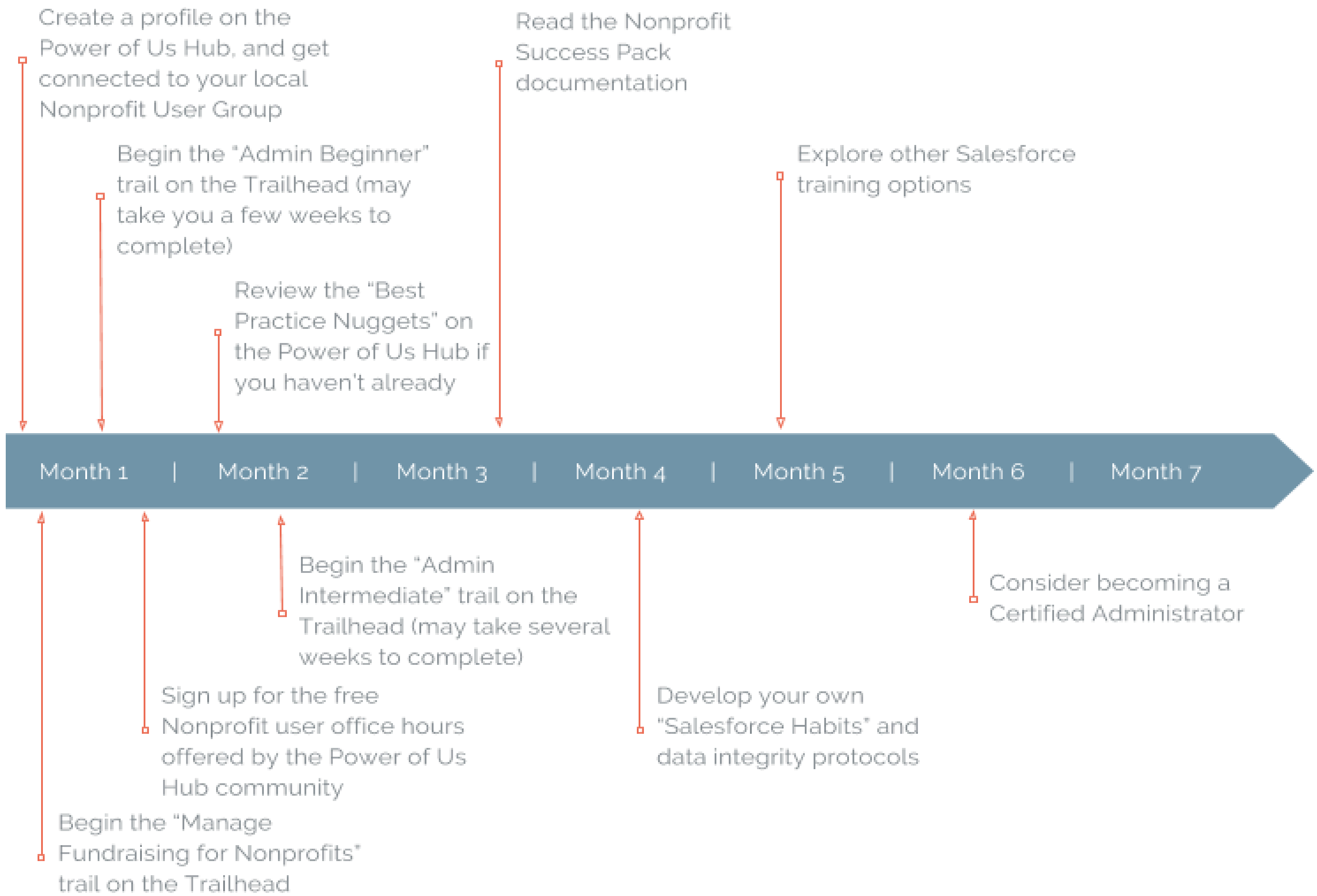
Your Learning Timeline

Salesforce is a huge platform, with thousands of resources and opportunities to learn. It can be truly overwhelming, especially for those who have limited time devoted to learning. Below is a simple learning timeline that will help you move from having no Salesforce experience to being a fully capable administrator. This timeline assumes roughly *four hours per week* spent on formal training for the first three months. This training is in addition to regular Salesforce administrator responsibilities, as outlined in Your Job as an Administrator.

Of course, your learning timeline should be defined in partnership with your manager / supervisor (use the Learning Timeline Template as a starting point). Because many small organizations don't have a budget for technical training, the training options outlined below are all free. You may also want to consider the range of paid trainings offered to nonprofit Salesforce users at a discount listed here.



**This timeline assumes roughly four hours per week of ongoing training effort*

Your Job as an Administrator

As a Salesforce administrator at a small organization, your job has many duties. Below are your four most important objectives.

Essential Duties

Driving Engagement: Salesforce only offers value if your staff use it consistently.

Tools & techniques include: Regular Salesforce trainings & presentations; regular communication about Salesforce changes; quickly troubleshooting user problems; creating help documentation; monitoring Salesforce use; talking to staff about their use of Salesforce (or lack thereof); empowering technically-inclined staff to serve as "power users" and invest extra energy in training them; engaging managers to talk with their staff about low engagement.

Enforcing Data Cleanliness: Often the biggest barrier to staff trusting Salesforce is messy data.

Tools & techniques include: Running the Nonprofit Starter Pack Health Check; creating dashboards and reports to monitor areas where messy data presents the greatest risk; using duplicate check settings and validation rules; engaging managers to check data entry via approval workflows; checking data entry via regular audits; minimizing the amount of data collected and entered; making key fields required.

Effective Reports & Dashboards: Staff must be able to extract useful data and insights via reports.

Tools & techniques include: Train your staff to build their own reports; provide report and dashboard guidelines such as "use a consistent naming convention" or "always include record unique identifiers"; Create a folder structure to organize reports in a logical way; help staff create as few reports as possible to meet their needs; schedule reports and dashboards to send to users to encourage regular review; facilitate reflection on reports or dashboards in regular meetings.

Ongoing Updates: You and your staff will always have ideas for improvement.

Tools & techniques include: Create a backlog of Salesforce updates; prioritize your backlog based on the business value of each update; address any issues that prevent staff from doing their work immediately; look for the simplest solution to any user request; look for ways to minimize new data entry by using formula fields or workflow rules; add help text on any new fields; update help documentation / user guides after updates are made; test updates with staff before calling them 'done'; send an email to all users when an update is made; and for complex updates or changes, consider engaging consults or outside experts.

Planning Your Work

I like to think about the work of a Salesforce Administrator in terms of "habits" - ongoing pieces of work that need to be repeated over time - and "projects" - pieces of work that typically only need to be done once.

Habits are the foundations for your organization's success with Salesforce. A few benefits of defining Salesforce administration habits:

- Habits allow you to turn reactive work (i.e., getting requests at random for your team) into something you can plan for (i.e., add new requests to the Salesforce backlog, and spend 10 hours a month working on the highest priority items)
- Habits free you from spending too much time thinking "what do I need to do this week" and allow you to focus on the do-ing
- Habits help you clearly communicate what you're spending your time on with your manager and the rest of your team

Below I list some sample habits for a new Salesforce administrator at a small organization. Consider this a menu of options for how you might accomplish the essential duties of a Salesforce administrator outlined above.

Habit	Why is this important?	Hours per month	How do we know it's done?
Ongoing Salesforce troubleshooting, adding new users & disabling inactive users; creating reports and other system development items as outlined in the Salesforce backlog	Driving engagement Ongoing updates	10	Response to all emails within 24 hours; new / revised reports used by team members; completed backlog items
Regular participation in staff meetings to identify ways Salesforce objects or data could support operations	Driving engagement	5	Active participation in staff meetings
Regular distribution of key reports or dashboards to all staff; facilitating discussion of these reports at staff meetings	Driving engagement Effective reports & dashboards	5	Reports are discussed in meetings; staff ask questions about how metrics are calculated and concerns around data integrity are addressed
Monthly Data Quality Checks (see Data Integrity Controls for some ideas on these)	Enforcing data cleanliness	5	Obvious errors identified have been fixed; Data integrity issues have been discussed and documented so staff is aware; ongoing issues / concerns are discussed at staff meetings
Health Check is run on a monthly basis	Enforcing data	5	Obvious errors identified have been fixed or

and errors are remediated	cleanliness		determined to be unimportant
Regular staff refresher training; Maintenance of training materials	Driving engagement Ongoing updates	5	All new employees using Salesforce system receive training on system purpose and use. One all-staff training is conducted per year. Support documentation for system is kept up-to-date.
Ongoing administrator training	Admin's ability to deliver value to staff	5	Completion of training modules and objectives; reports back to managers and staff on lessons learned

Useful Templates

The following pages contain templates that I've found helpful in organizing my own Salesforce Administration work and helping clients organize theirs.

Learning Timeline

Timeline	Task	Why?	Link
Month One - First week	Create a profile on the Power of Us Hub, and get connected to your local Nonprofit User Group.	The Power of Us Hub is the online community of nonprofit Salesforce users. Search here for answers to common questions related to nonprofits and Salesforce.	https://powerofus.force.com/articles/Resource/Getting-Started-in-the-Power-of-US-Hub#!#follow
Month One - First week	Begin the "Manage Fundraising for Nonprofits" trail on the Trailhead.	The Nonprofit Success Pack comes with many non-obvious features that are explained in this trail.	https://trailhead.salesforce.com/trail/nonprofit_fundraising
Month One - Third Week	Begin the "Admin Beginner" trail on the Trailhead. This may take you a few weeks to complete.	The Admin Beginner trail is the best resource for new Admins, covering the basics of the Salesforce platform.	https://trailhead.salesforce.com/trail/force_com_admin_beginner
Month One - Fourth Week	Sign up for the free Nonprofit user office hours offered by the Power of Us Hub community	Even if you don't have a question for the office hours, check out one session to get a feel for the kinds of questions typically asked.	https://powerofus.force.com/articles/Resource/Salesforce-com-Foundation-Weekly-Office-Hours
Month Two - First Week	Review the "Best Practice Nuggets" on the Power of Us Hub if you haven't already	This short guide contains great ideas on training, launching, and managing adoption.	https://powerofus.force.com/apex/nuggets?sfdc.tabName=01r80000000H2ix
Month Two - Second Week	Begin the "Admin Intermediate" trail on the Trailhead. This may take you several weeks to complete.	Covers more standard platform features like Formulas, Field updates, Validation Rules, and Security.	https://trailhead.salesforce.com/trail/force_com_admin_intermediate
Month Three	Read the Nonprofit Success Pack documentation.	This will be a reminder of what you learned in the "Manage Fundraising" trail. Contains tutorials to share with your staff.	https://powerofus.force.com/articles/Resource/NPSP-Documentation
Month Four	Develop your own Salesforce Habits and Data Integrity Protocols	Now that you're familiar with the platform, begin to work proactively instead of reactively.	See the following templates for more information
Month Five	Explore other Salesforce training options	You have the basics down. If you need more skills in a specific area these are some of the best resources.	https://powerofus.force.com/articles/Resource/Salesforce-Training-Options-for-Nonpr

			ofits?srKp=ka0&srPos=0
Month Severn	Consider becoming a Certified Administrator	Holding an Admin Certification legitimizes the skills you've already built and confirms there are no significant gaps in your knowledge. Nonprofit users get a discount on the exam.	https://powerofus.force.com/articles/Resource/Salesforce-Training-Options-for-Nonprofits?srKp=ka0&srPos=0

Administrator Job Description

If you're looking to hire a new individual to administer your Salesforce instance, you may need a job description for the role. Consider these as potential items to include in such a job description. The responsibilities and experience listed below are tailored to be appropriate for a small nonprofit organization of roughly 10 users.

Responsibilities:

- Serve as primary point of contact for third party consultants and implementation specialists.
- Schedule, participate in, and document all discovery and coaching calls during implementation.
- Work with and support external consultants in understanding requirements, testing applications, and developing training docs.
- Update and administer the organization's Salesforce instance as needed, working with organization's fundraising, programs and finance teams.
- Provide Salesforce users with technical support, drawing on resources such as Salesforce Trailhead, Power of Us Hub, and other training documentation.
- Set up new staff with Salesforce accounts (as needed) and train new staff on system use with support from the staff's manager.
- Support staff in the report generation process, troubleshooting as needed.
- Troubleshoot with staff in the updating of objects, fields, formulas, validation rules, views, custom workflows, and processes as needed.
- Identify areas where engaging in an external Salesforce expert may be useful.
- Vet new releases or features with executive director or management team (e.g. - new releases, build, objects, and integrations) before making permanent changes to the system.
- Maintain documentation on processes, policies, application configuration and help-related Salesforce materials for end-users.

Desired Experience:

- Have strong written and verbal communication skills.
- Interest in learning more about cloud databases in general and Salesforce in particular.
- Interest in working across teams including administrative staff, programs staff, and technology specialists.
- Interest in eventually becoming a certified Salesforce Administrator.
- Interest in learning tools for data visualization and analysis such as Excel, Tableau, R, or Python.

Salesforce Protocols

At some point, your team will want to compare data entered by different people over time. However, different people may interpret picklist values or record types in Salesforce differently. For your data to be comparable over time, it's critical to create clear protocols and definitions for how users interact with your Salesforce org.

Your use of Salesforce and the configuration of your system determine what protocols you document. Be on the lookout for areas that staff often have questions about, particularly fields, objects, or workflows that are prone to misinterpretation. Maintain documentation of these protocols in a central location that staff can be directed back to at any time, Below are some examples to get you started.

Object(s)	Protocol	Example
All	Always search before entering new objects	Always use the Chatter search feature before entering a new contact, account, opportunity, or campaign to prevent duplicate data entry.
Contact	Use consistent Contact Types	**Partner** = Individual that is or is intended to be the point person for our organization's programming at their site **Donor** = Individual that personally donates or intends to personally donate to our organization **Friend** = Champion and advocate for our organization in the community **Sponsor** = Individual whose organization donates or intends to personally donate to us **Staff** = Current full-time or part-time staff member, or intern
Affiliation, Account, Contact	Define the difference between a contact's Account vs a contact's Affiliation	Contacts are related to both households (i.e., their immediate family) and organizations (i.e., their employers or those they volunteer with). Contacts are linked to households via the Account field on the contact record. Contacts are linked to organizations via the Affiliations object, as can be seen via the Affiliations related list on the contact and organization account records.
Lead	Define what a lead is	A lead is any individual that our organization comes in contact with that we anticipate connecting with again in a professional context.
Lead	Use consistent Lead Types	See "Contact Types" for some examples.
Lead	Define lead conversion criteria	Convert a lead to a contact, account, and opportunity if they have been followed up with, and there is a clear potential for future revenue (i.e., an Opportunity)
Account	Use consistent Account Types	**Household** - Represents a group of people in a family. Organizing contacts into Households is important to avoid soliciting two different household members in the same campaign. Contacts are linked to Household accounts via the "Account" field on the contact record. **Organization** - Represents a group of people in a company, organization, or institution. Contacts may be connected to Organizations through the "Affiliations" object, which appears as a list on both the Contact and the

		Organization record.
Account	Define what an account is and the difference between record types (if applicable)	An account represents a group of individuals, namely either an organization or a household. An organization account represents companies or businesses. A household account represents a giving unit, typically a family.
Campaign	Use consistent Campaign Types	**Email** - Represents a donor solicitation or marketing message delivered via Email. **Mailing** - Represents a donor solicitation or marketing message delivered via direct mail.
Opportunity	Define what an opportunity is and the difference between record types (if applicable)	An opportunity is any potential grant or donation to the organization. The types of opportunities are defined as follows: **Grant**: A grant from a foundation **In-Kind Gift**: Any in-kind products or services received **Donation**: A donation from an individual or family <=$2,000 **Major Gift**: A donation from an individual or family >=$2,000
Opportunity	Define stages	**Prospecting** = Staff are in the process of defining the potential grant or donation. Revenue can not be recognized. **Pledged** = An organization or individual has committed to the donation or grant, but the money has not been received. Revenue can be recognized. **Posted** = Money has been received by the organization for this grant or donation.
Activity	Define when to record an activity for a contact / account / opportunity.	An activity represents a point of contact (i.e., email, phone call, meeting) with a key contact or account. Activities are useful so other staff can see the conversation history with these individuals and organizations. For simplicity, only record activities for Major Donors (i.e., annual giving >=$2000) or individuals from grantmaking organizations.
Activity (email integration)	Be consistent with what emails to push to Salesforce	Only sync emails to Salesforce that relate to an ongoing project or donation for Major Donors or grantmaking organizations. These emails should be mapped to both the contact/account and the relevant opportunity.

Data Integrity Controls

Regardless of how well you've designed your Salesforce system and how thorough your protocols are, data entry errors will happen. As a part-time system administrator you can't prevent all data entry issues. But you can have processes in place to review areas where incorrectly entered data might lead to inappropriate management decisions or inaccurate reporting to funders or the public.

Below are some data integrity controls to consider as examples. Data points to prioritize include: data that takes significant manual effort to enter; data that feeds reports or summaries given to funders about program activities; data that is used by Accounting for reconciling to the General Ledger.

Control	Frequency	Reviewer & Audience
Use the "Mass Delete" feature to delete any fake or test contacts, accounts, or campaigns.	Monthly	**Reviewer:** Program Manager **Approver:** N/A
Run Salesforce Data Quality Analysis Dashboard to assess the overall quality of data on standard Salesforce objects. This dashboard is free and may be installed on the App Exchange here.	Monthly	**Reviewer:** Salesforce Administrator **Approver:** Program Manager
Run Salesforce Adoption Dashboard to assess the level of staff engagement with Salesforce. This dashboard is free and may be installed on the App Exchange here.	Monthly	**Reviewer:** Salesforce Administrator **Approver:** Program Manager
Run the custom-made Client Demographic Completion and Quality Report. The Program Manager reviews the report, flags any data quality concerns, and emails the appropriate staff for review.	Quarterly	**Reviewer:** Program Manager **Approver:** Program Director
Pull a list of all contacts, identifies potential duplicates, and sends the list to staff for review. The Salesforce Administrator merges any duplicate records confirmed by staff, and prepares a summary for the Program Manager. When patterns for duplicates are discovered, the Salesforce Administrator builds rules to prevent such duplicates using Salesforce's Duplicate Management features.	Quarterly	**Reviewer:** Program Staff **Approver:** Program Manager
Audit a subsample of new Program Participant contact records to verify accuracy of data entry. Any discrepancies between Salesforce and paper forms are discussed with the program staff who entered the contact. Results of this audit are communicated to the Program Manager.	Quarterly	**Reviewer:** Salesforce Administrator **Approver:** Program Manager

About the Author

Like many, I started helping social sector organizations implement technology systems by accident.

Growing up, my family depended on many nonprofits and government agencies as we navigated challenges of employment, physical and mental health, and poverty. In college I interned with a wide range of social sector organizations, and was fortunate to get a job offer at a consulting firm after graduating.

At this company I had the opportunity to work on a handful of social sector clients. One day we were in a meeting with a program director, and we asked her a typical consulting question - "tell us about your challenges." She launched into a description of the three different databases her team uses, all holding duplicative information, none of which did what her team needed. It was driving everyone insane.

Once I started looking for this narrative, I realized nearly every nonprofit has some version of this story. With each new system, they were sold on a dream of an easier way to do business and serve their clients. But those were false promises - not because the technology was inadequate, but because the process of launching, using, and deriving value from the technology was all too often mismanaged.

When I made the jump to working for a nonprofit, I promised I would do better. Over the next two years I worked with a great team at a mid-size family resource center in San Francisco to relaunch their data system and use that information to reflect on the effectiveness of their programs. I started getting asked to do project work for other organizations, and at the same time my wife and I made a decision that we need to live someplace with a more equitable economy.

In January 2017 my wife and I moved to Denver, and I left my full-time role to devote myself to building a consulting practice that can help nonprofits realize the promise of data and technology to achieve their mission. I don't promise to be an expert, but I do feel a responsibility to share the lessons I learned while on this journey. If you've read it and would like to provide feedback or updates, please email me: paul@paulbcollier.com