

PRO - TIPS



# IS VIRTUAL SALESFORCE ADMINISTRATION RIGHT FOR YOUR ORGANIZATION?



As a nonprofit that is committed to Salesforce, your organization understands the importance and value of having a great Salesforce administrator on your team.

The role of Salesforce administrator is unique. It requires expertise in the Salesforce.org platform, in your specific instance of Salesforce and in your organization's mission, goals and processes.

Many nonprofits struggle to find someone with this depth and breadth of expertise. Larger organizations often hire a team of administrators. Medium and small nonprofits often get by with an “accidental administrator” or assign the role to their most technically-proficient team member in addition to other duties.

The concept of Virtual Salesforce Administration is relatively new, and can be a great complement to your in-house team to ensure that Salesforce is effectively supporting your organization's mission.

This short guide will help you understand what Virtual Salesforce Administration is and whether it might be a good fit for your nonprofit.



# WHAT IS VIRTUAL SALESFORCE ADMINISTRATION?

**Let's start by defining "Virtual Salesforce Administration".**

**Virtual Salesforce Administration** is an on-call, certified Salesforce expert or team of certified experts who understand your specific Salesforce instance and can step in to support a wide range of administration tasks as needed. Most virtual Salesforce administration services are used in small increments of 1-2 hours at a time, and the work can be anything from report creation to more complex technical or workflow design tasks.

## **Virtual Salesforce Administration is...**

**On Call** – a direct line to a dedicated Salesforce expert; only pay for what you use

**Certified** – talk to a Salesforce-certified expert who has “been there... done that”

**Knows your instance** – get answers and solutions tailored to the way your team uses Salesforce



# SIZE AND COMPLEXITY MAKE A DIFFERENCE

Your user count and the complexity of your Salesforce instance affect both your need for Salesforce administration and the budget you have available to support it. Virtual Salesforce Administration is a good fit for small and medium sized organizations.

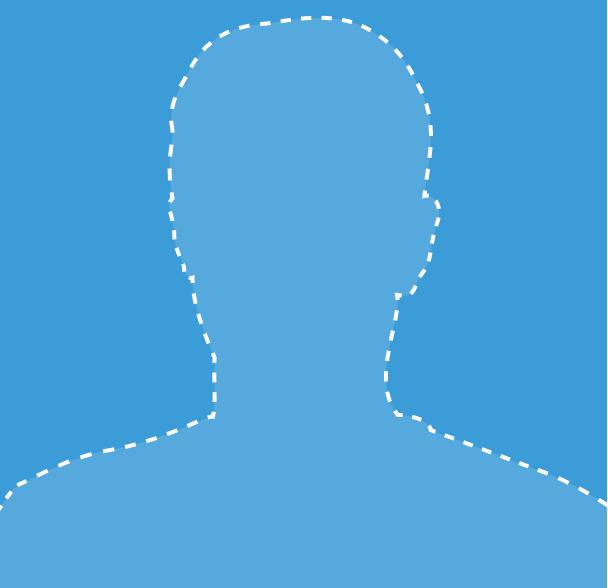
|  | <b>Large, Complex</b><br>(30+ users) | <b>Medium Size &amp; Complexity</b><br>(11-30 users) | <b>Small, Simple</b><br>(Up to 10 users) |
|--|--------------------------------------|--|--|
| <b>System Design, Integration, &amp; Development</b>           | Consulting Partner                   | Consulting Partner                                   | Consulting Partner                       |
| <b>Configure Pages, Fields, Workflows, Reports, Dashboards</b> |                                      |  |  |
| <b>Routine Data Maintenance</b>                                | Full Time Salesforce Admin(s)        | Virtual Salesforce Administration                    | Virtual Salesforce Administration        |
| <b>Manage Users / Troubleshooting</b>                          |                                      | Part-Time Salesforce Admin                           | Superuser                                |



## COMMON SCENARIOS THAT CALL FOR VIRTUAL SALESFORCE ADMINISTRATION

## SCENARIO

1



## HELP! I JUST LOST MY SALESFORCE ADMIN

You just lost your only Salesforce resource. You know this person did a lot to keep your Salesforce instance in good shape, and you want to keep it that way.



It may take several months to hire a replacement.

Virtual Salesforce Administration is a great fit!

## How Can Virtual Administration Help?

**Virtual Salesforce Administration is an on-call, certified expert who can quickly learn and support your specific Salesforce instance.**

- Certified expertise** to help prioritize tasks so things continue to run smoothly
- Get help with a **wide range of tasks** from the routine to the complex
- Only pay for the time you need with an **on-call** resource
- Quick answers that are **relevant to your Salesforce instance**
- Get assistance with **training** when you hire a new Salesforce admin



## SCENARIO

2

## I JUST HIRED A NEW SALESFORCE ADMINISTRATOR

You just hired a new team member to serve as your Salesforce Admin, among other duties. You'd like him/her to have some support during the first year.



We expect our new team member to wear lots of hats, including Salesforce Admin.

Virtual Salesforce Administration is a great fit!

## How Can Virtual Administration Help?

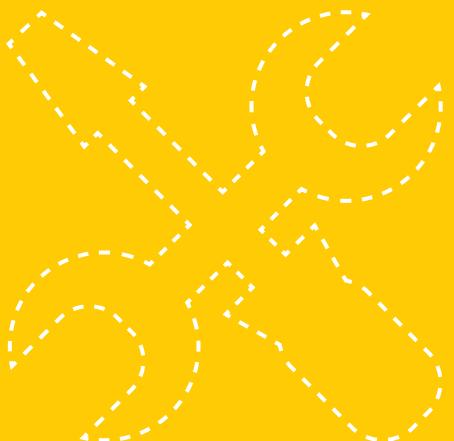
As an on-call, Salesforce-certified team of experts who know your instance, Virtual Salesforce Administration can train and mentor your new admin on everything Salesforce.

- Use a **certified expert** to help train your new team member
- Consult an **expert in your Salesforce instance** to explain how and why it's configured the way that it is
- Use an **on-call resource** to double-check that system changes and upgrades are seamless
- Get answers faster** than are available through online communities
- Access a team of experts who can help with a **wide range of simple or complex needs**



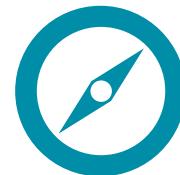
SCENARIO

3



## WE NEED GUIDANCE TO HELP SALESFORCE EVOLVE WITH US

We love the flexibility of the Salesforce platform and we want to make sure we're getting the most out of it. There's so much more we can do and we want an expert to help us navigate the path ahead.



Salesforce is easy to use and we know just enough to be dangerous.

Virtual Salesforce Administration is a great fit!

## How Can Virtual Administration Help?

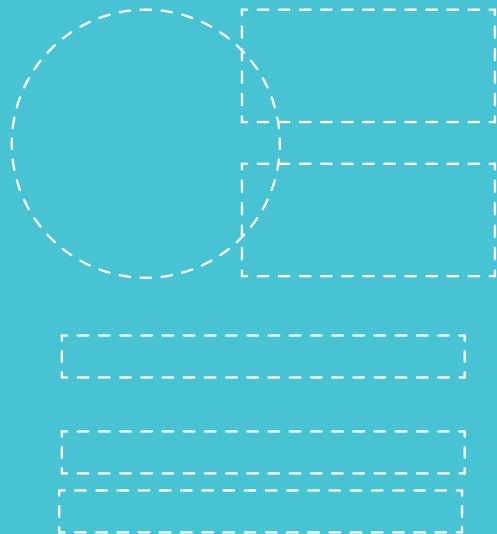
Virtual Salesforce Administration offers an on-call, certified team of experts who know your instance of Salesforce to help keep you moving forward on the right path.

- ✓ An **experienced, certified expert** to help validate and prioritize your ideas so you stay on the right track
- ✓ Get help with changes and configurations that are **unique to your Salesforce instance**
- ✓ An **efficient, on-call resource** when you only need help an hour or two every few weeks
- ✓ Access a **team of experts with broad expertise** to support strategic decisions and answer tactical questions
- ✓ Rely on a dedicated point-of-contact to **double-check your planned changes** before they go live



## SCENARIO

4



## I NEED TO CREATE LOTS OF NEW REPORTS AND DASHBOARDS

We've been using Salesforce for a while now and there are a host of things that we want to incorporate into reports and dashboards.



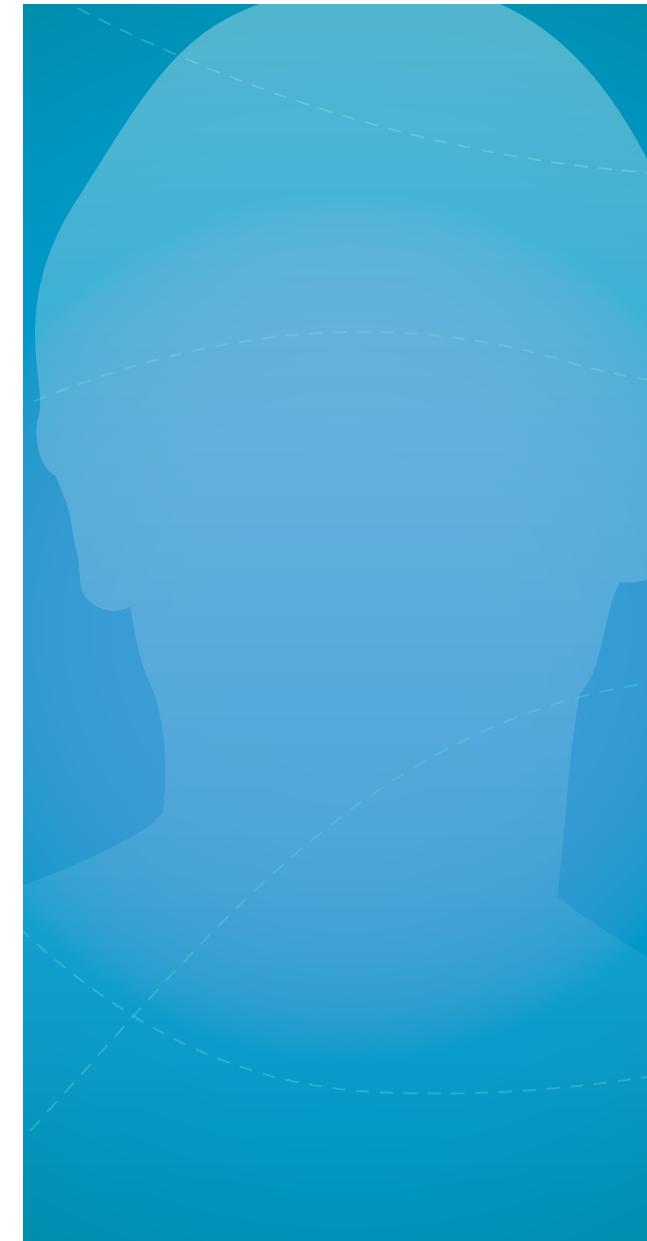
Creating reports always takes us longer than it should.

Virtual Salesforce Administration is a great fit!

## How Can Virtual Administration Help?

Virtual Salesforce Administration provides on-call, Salesforce-certified expertise to help you organize and present data that supports better decision-making.

- An experienced, certified expert can help address common reporting challenges like **how to present summary data**
- When you need to report on data you don't directly track, an expert who knows your Salesforce instance can help **decide whether adding a new field is the right decision**
- An **on-call resource** can help you make regular improvements to your reports and dashboards.
- An **experienced virtual Salesforce administrator** who understands your operations can help you organize the data your executive team wants to see
- A Salesforce-certified expert **who knows your data model** can answer your specific reporting questions and challenges much faster than trial and error.





## About KELL Partners

KELL Partners is a consulting firm specializing in Salesforce solutions for nonprofits.

KELL Partners has helped over 1,000 nonprofits implement and train on the Salesforce platform. With services ranging from KELL360™ to implementations with complex custom needs, application development and data migrations. KELL Partners provides the expertise to set up and configure Salesforce, along with the hands-on training, guidance, ongoing support and consulting nonprofits need to ensure success.

## We want to hear from you!

If you want the lowdown on services, solutions, support and all the red-tape-defying feats we can do for orgs like yours, get in touch.

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**For Information about KELL  
Partners Virtual Salesforce  
Administration services.**

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