

Rent-An-Admin

Suggested Salesforce Maintenance Activities

Task	Description	Suggested Frequency
TASKS		
Create Basic Custom Reports	Primary object, report type, and deployment status.	Monthly
Create Basic Custom Dashboards	View based on custom reports containing data you want displayed.	Monthly
Create Basic Custom Workflow	Customize application from the workflow and approvals setting page.	Yearly
Modify Page Layouts	Customize the look and feel of page layouts for standard Salesforce objects.	Monthly
New Enhancement Training	Training based on the quarterly enhancements.	Quarterly
Setup New Roles	Manage roles of internal users to determine levels of access.	Weekly
Setup Permissions	Determine tasks users can perform and what features they can access.	Weekly
EVALUATION		
Best Processes Examination	Examine current processes and determine opportunity for improvement.	Weekly
User Feedback Evaluation	Examine current user issues and determine solutions.	Monthly
Identify Folder Management	Determine capabilities of content.	Monthly
Host "User Groups"	Analyze best practices; share Salesforce tips.	Monthly
Salesforce Governance Meetings	Prioritize requests and align Salesforce initiatives.	Monthly
Review Documentation	Examine current documentation.	Yearly
Review End User Training	Determine process for on-boarding new users.	Yearly
HOUSEKEEPING ITEMS		
"Eat and Delete" Luncheon	Meet with internal users to clean up their Salesforce workspace.	Quarterly
Review Reports	Analyze current reports and make quality suggestions.	Quarterly
Review Data Quality	Improve the quality of data, manage assets, and remove duplicates.	Monthly
Review Dashboards	Analyze current dashboard functionality and advise.	Quarterly
TRAINING AND DEVELOPING		
Train a user on a Specific Task	Create and implement training to an individual based on a desired Salesforce task.	Quarterly
Train a Team on a Specific Task	Create and implement a training session based on a desired Salesforce task.	Quarterly
Create Customized Documentation (per task)	Build company standardized procedure.	Yearly
Create Customized On-Boarding Training	Build company standardized training documentation.	Yearly

* Customization may include additional development hours and fees upon agreed upon plan.

**All Plans are based on a monthly fee and therefore a use it or lose it policy. Hours will not rollover into another month.