



Habits of a Successful Salesforce Admin

Just like the book *The Power of Habit* by award-winning business reporter Charles Duhigg tells us, changing our working habits may drastically change our performance and help us make the most of the time we spend working. Similarly, your Salesforce admin habits can influence how you work and boost productivity.

Given below are some habits that a salesforce admin might adopt to improve performance, task organization, and time management.

Take charge

If you are a Salesforce administrator then you can't wait until someone screws up the Salesforce workflow. You have to take charge and complete tasks like adding new features before the management urge you to do it.

Taking charge involves keeping an eye on what's going on in your organization. As an admin, your job is to examine logins, resource use, audit trails, and debug logs. This also allows you to respond quickly to any concerns that may arise in the future.

Communicating with your company's employees and management helps in knowing where the organization is headed and sensing the emotion around Salesforce is useful information for everyday decisions.

Always keep the end goal in mind

As a Salesforce administrator, You should be able to lead and not just mindlessly follow everything.

You can get day-to-day requests like 'Put a button here', or 'build an automation there' and you have to consider them. Think before you do, You can rule the day, but you can't take the risk of having an out-of-control organization because of it.

Every modification should be thoroughly planned. Maintain your planning, development, and deployment cycle. Always keep the larger picture in mind, you should ask questions like will

the change benefit the platform, our consumers, and the company in the long run? And plan accordingly to achieve your end goal.

Prioritize your tasks

All of the demands that come your way can immediately overwhelm you. You should keep track of bugs and requests in a backlog to manage the workload.

You need to prioritize the tasks according to their importance and urgency. The priorities must be dependent on how important a task is and when it is due. When you prioritize all the tasks then you can make a list starting from the highest priority task to the lowest. Now, you can start at the top of the list and work your way down.

Consider win-win scenarios.

When someone proposes a solution then there can be a disadvantage to it. So it is your responsibility to weigh all factors related to the proposed solution and come up with a win-win scenario.

For instance, a CEO could wish to keep all of the company's documentation in Salesforce. As a result, storage costs might spiral out of control, and users will be irritated as they can no longer easily interact using data.

Integration between Salesforce and a document management system would have been a better option in this scenario. Looking for such a win-win scenario is a must for a Salesforce admin.

Understand before expecting to be understood.

Being a Salesforce expert can be both a benefit and a liability. Your expertise in Salesforce can badly influence the conversation while speaking with the users. Don't be too judgemental and try to understand user concerns.

End users get to judge what works and what can be improved. As an admin, you need to communicate with them with an open mind. Try to understand their feelings and how you can help them.

Even if you believe that a request is hard to fulfill, always keep in mind that it might be due to your constraints rather than it being a platform limitation.

Focus on teamwork

Even if you have all the Salesforce expertise that you need, it's still beneficial to surround yourself with peers who can help you analyze all of the possibilities for a given situation. The platform is far too large for anyone to know everything. As an administrator, working as part of a team improves your performance.

Also, do not think of a team as a fixed set of individuals. It might be a User Group, WhatsApp group, or your Salesforce Account Executive, depending on the use case. One of the important success elements in the Salesforce ecosystem is information sharing and you must not hesitate to give and take knowledge.

Keep evolving

Salesforce is always changing as a CRM platform. So you should also continue learning to adapt to a constantly evolving platform like Salesforce. Get certified by completing Trailheads modules. Make time to meet with other administrators and learn from them. Last but not least, try to create a good work-life balance. Take care of your physical, mental, and spiritual well-being.

Giving back to the community is an important aspect of being a Salesforce-certified professional.

To summarize, a Salesforce admin is responsible for various important duties one must perform to fulfill all user requirements. The habits listed above can change you into a highly efficient Salesforce Administrator rather than "simply an Admin." As a result, if you want to improve as an administrator, it's essential to develop these habits and practice them daily.

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