

Salesforce Budget Checklist: A Strategic Guide

Ensuring your Salesforce investment delivers maximum value requires strategic planning and a detailed understanding of your current and future business needs. Use this checklist to guide your budgeting process and align your Salesforce initiatives with your organisational goals.

1. Strategic Planning for Salesforce Success



Evaluate Your Salesforce Needs and Processes

- ☐ Do you have a defined budget process for Salesforce needs?
- ☐ What are your organisational goals for the next year or long-term plans that Salesforce will support?
- ☐ Can you describe how Salesforce will contribute to achieving these goals?
- ☐ What does success look like for you and your stakeholders over the next 12-18 months?
- ☐ Have you broken down your Salesforce investments into a clear roadmap or timeline?

Plan for Upcoming Business Changes

- ☐ Are there any known projects or significant changes in the pipeline?
- ☐ Do you anticipate any staffing changes that could impact Salesforce usage?
- ☐ Is your organisation planning any mergers, acquisitions, or funding rounds?





2. Tactical Considerations for Immediate Needs

Addressing User Needs and System Maintenance

- ☐ Have you identified any immediate needs for your Salesforce end-users?
- ☐ Is there a regular maintenance schedule to address bugs and system issues?
- ☐ Are there any updates or decommissions needed for outdated features or strategies?
- ☐ Have you considered the impact of new Salesforce releases on your current setup?

Adopting Artificial Intelligence and New Technologies

- ☐ How can Artificial Intelligence (AI) be integrated into your business to enhance operations and customer interactions?
- ☐ Have you evaluated the security and compliance implications of adopting new AI technologies?
- ☐ Are there future use cases for AI within your organisation, such as virtual assistants or advanced data analysis?



3. Aligning Salesforce with Business Initiatives

New Business Initiatives and Salesforce Integration

- ☐ How will new business initiatives align with your Salesforce strategy?
- ☐ What new Salesforce features or products could support these initiatives?
- ☐ Are there any industry certifications or compliance requirements to consider?

Enhancing User Experience

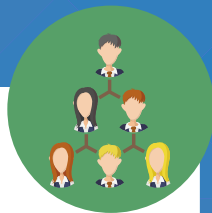
- ☐ Is your Salesforce setup user-friendly and tailored to the needs of your team?
- ☐ Have you leveraged Salesforce partner expertise to improve system usability?
- ☐ Is there ongoing user feedback that indicates the need for system improvements?



4. Preparing for Organisational Changes

Anticipate and Plan for Changes

- ☐ Do you have forecasts for known projects and their estimated costs?
- ☐ What staffing changes are necessary to maintain your Salesforce infrastructure?
- ☐ Are there any significant hires or company structure changes planned?
- ☐ How might global events impact your business and Salesforce usage?



5. Engaging with External Support

Collaborating with Your Salesforce Account Executive (AE)

- ☐ Have you shared your Salesforce roadmap with your AE and involved them in planning?
- ☐ Do you discuss licence adjustments, new products, and support needs regularly with your AE?

Engaging with Salesforce Partners

- ☐ Have you consulted with Salesforce partners for prioritising tasks and managing costs?
- ☐ Do you invest in strategic consulting sessions like Innovation Workshops to align business goals with your Salesforce roadmap?





6. Managing Risks and Compliance

Risk Management and Mitigation

- ☐ How have you controlled costs in the past, and what measures can be taken moving forward?
- ☐ Are there any major risks that need to be managed or anticipated?
- ☐ Do you foresee any new compliance or regulatory changes that could affect your Salesforce setup?



7. Ongoing Reviews and Support

User Licences and Storage Limits

- ☐ Regularly review and adjust user licences to match your needs.
- ☐ Monitor data and file storage usage to avoid exceeding limits and incurring additional costs.

Support and Maintenance

- ☐ Assess your support needs and establish a regular maintenance schedule.
- ☐ Plan for the integration of new Salesforce features and products.

Training and Development

- ☐ Invest in training your team to ensure proficiency with the latest Salesforce features.



By following this strategic guide and focusing on careful planning, regular maintenance, and expert support, your organisation can maximise the value of its Salesforce investment. This approach will enhance efficiency, improve customer relationships, and drive growth.

For personalised assistance, [contact us](#) at SalesFix. Our team of experts is ready to support your journey to success with Salesforce.