

BUSINESS APPLICATION MANAGER PROFILE

A key driver of CRM success is identifying the right person to manage the application for your organization. Many of our customers have asked us what makes a successful salesforce.com business application manager (BAM). This article will lay out the ideal profile of this individual including scope of responsibilities, skill sets, and application tasks that will be required for successful performance in this critical role.

The major focus of a successful BAM is to ensure 100 percent adoption rates within the customer's user groups and to completely align salesforce.com with the company's business processes. In many cases, we have seen an executive or senior manager take on this role and perform very well. However, we realize that senior executives often do not have the time or the desire to take responsibility for administering salesforce.com and performing important tasks such as updating the application to reflect business process improvements. While some companies devote an entire full-time resource to this role, most of our customers find an existing employee who can dedicate a portion of his or her time to managing salesforce.com.

Sample Responsibilities for a Typical salesforce.com Business Application Manager

- Train users (or coordinate training) and "sell" them on salesforce.com and CRM
- Regularly communicate with, motivate, and update users
- Represent the "voice" of the user community to management
- Ensure incorporation of appropriate user requirements
- Hold quarterly update meetings with the initial steering committee to revisit application success factors
- Attend ongoing salesforce.com training sessions as new features and updates are launched
- Stay on top of organizational changes or business process improvements and adapt salesforce.com as necessary
- Ensure appropriate use of the application

Skills Checklist

When seeking an appropriate BAM from among internal resources or external candidates, we recommend you look for the following general qualities and skills:

- Ability to garner executive-level support and respect
- Belief in the benefits of CRM and salesforce.com for the user base
- Intimate knowledge of the organizational culture and structure
- Exceptional communication, motivational, and presentation skills
- Excellent training skills (if he/she will also be the salesforce.com internal trainer)
- Existing relationships with the managers of the user group, or strong interpersonal skills to build these relationships

- Analytical skills and business acumen for assessment of commonly requested changes and proactive identification of customizations that could help the business

Daily Task List

Users and administrators alike love salesforce.com for its industry-leading ease-of-use. That's why even business users with no programming skills can be excellent salesforce.com BAMs. Our intuitive user interface makes administrative duties a snap. Here are some of the regular tasks that your BAM can expect to perform:

- Maintain the role hierarchy as your organization changes its structure over time
- Reset user passwords
- Add, delete, and modify users as employees are hired, transferred, or leave the organization
- Act as the single point of contact for certain inquiries from the user group (e.g., answering "How to" questions that are specific to how your organization's business processes are reflected in salesforce.com)
- Assist with bulk imports of lead, contact, or account data after the go-live date
- Maintain security profiles and access rights for users
- Maintain, add, or delete auto-sharing rules
- Maintain, add, or delete lead assignment rules
- Configure shared, custom reports
- Configure standard UI options for groups of users
- Escalate issues to salesforce.com support as required
- Create or delete custom-defined fields
- Update custom-defined page layouts and record types

Depending on the size of your user base, some customers designate more than one BAM — each representing a particular business unit or region — to handle these responsibilities and to ensure cross-functional adoption rates and management support.

If you have any questions about the role of business application manager, or would like to hear more examples of salesforce.com BAM best practices, please contact your salesforce.com Customer Success Manager.

