SFT SALESFORCE
T R A I N I N G

Team Training | **Implementation** | **Adoption**

AMERICA'S #1 SALESFORCE TRAINING COMPANY

Which Course is Right for Us, and How Much Does it Cost?

The Three Factors You Need to Consider

If you're reading this, you've likely come to the conclusion, that despite all the fanfare and buzz associated with the world's most powerful CRM program, it's not something you just pick up and run with. Salesforce is many things. Intuitive, however, is not one of them. Hence, properly designed training is seen as a necessity.

It's likely too, that if you've come to this site, you've already investigated the free training options available, of which there are many. The problem is that there's really too many. There are literally thousands of videos available on YouTube and the Salesforce user guide is now well over 3500 pages long. The issue here is not finding free training material, it's how to dissect it into something useful.

The challenge with the question about price is that there is no simple answer. It's like asking someone, "How much does a house cost?" Well, that depends. Do you want a little two bedroom in an OK neighbourhood near the train tracks? Or do your tastes (and budget) run more in the realm of a 6 bedroom, 8 bathroom, palatial estate with pool and tennis court in an exlusive part of town?

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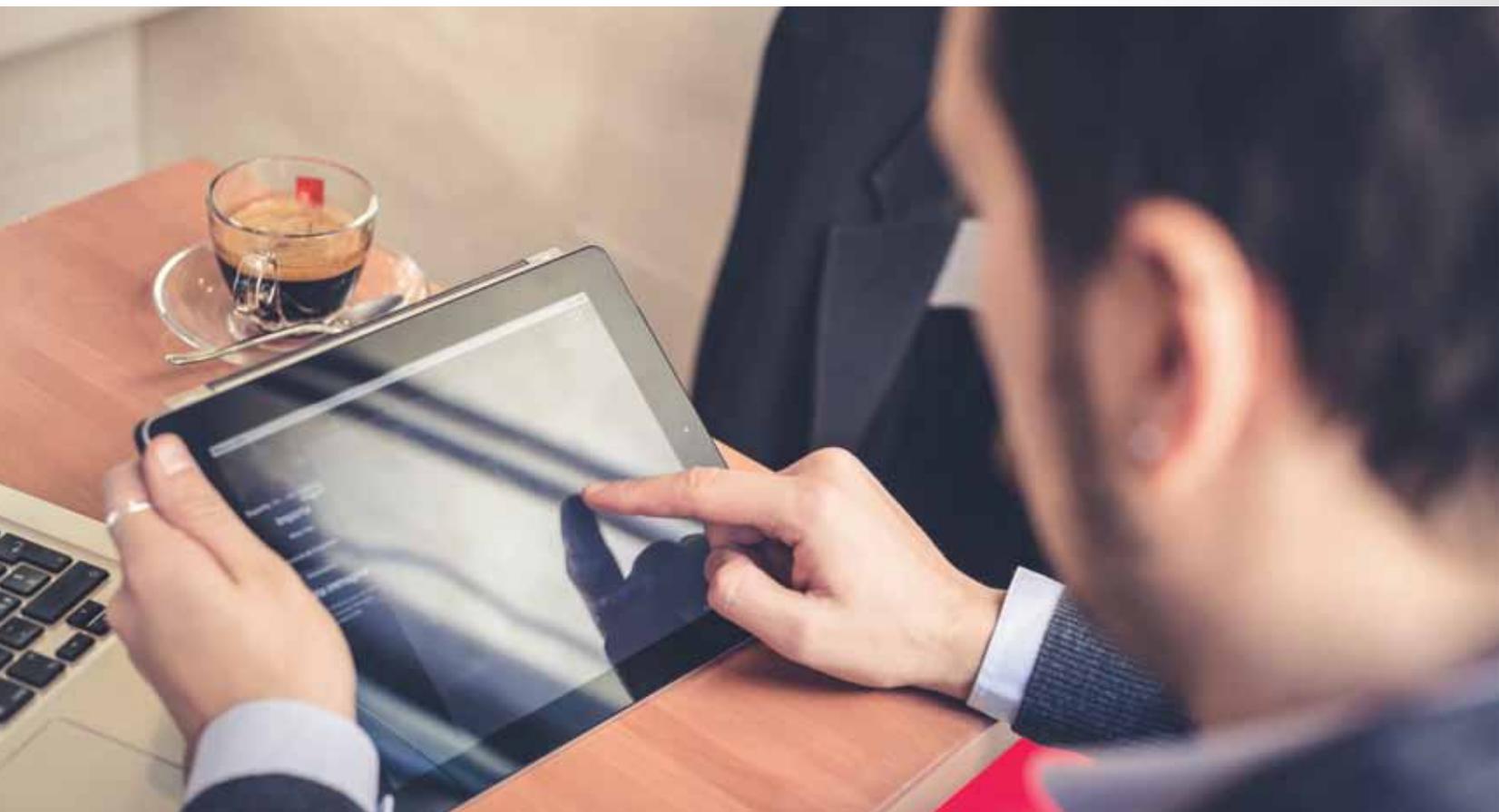
CONSIDERATION #1 - Who Needs the Training?

Broadly defined, there's really two categories of Salesforce training that are available – End-User Training, and Technical Training.

(i) End-users.

Traditionally, this group includes the sales people, service people, customer marketing team, management and the executives that need to understand how to use the system every day. However, with the ongoing development of the Force.com platform, this group has also extended to finance teams, warehouse personnel, human resources, and potentially, almost every department in your organization.

For the most part, the type of training that these users require should last about a day, depending on how many features they need to learn. You want training that provides coverage on the fundamentals, for instance.;

- The basic navigation of Salesforce
- Standard Salesforce Objects – Leads, Accounts, Contacts and Opportunities,
- For Service Teams, training on Cases and Solutions
- For Marketing Teams, training on Campaigns and Data Import
- For Managers and Executives, training on Analytics – Reports & Dashboards
- For everyone - Managing Activities with Tasks and Events

In addition, a number of other topics should be considered to help make the system easier to use, as well as drive productivity. Topics such as these;

- Using Salesforce with other email platforms, like Outlook or Gmail
- Chatter
- Advanced Opportunity features, such as Contact Roles, and Team Based Selling
- How to Create List Views
- How to use Salesforce on their mobile device

Time and Cost considerations:

- Plan for a full day of training for end-users
- Budget around $400 - $500 per user
- Look for pricing breaks based on the number of users. The more users, the lower the price per person should be.

(ii) Technical users.

This training is geared towards your system administrators, and possibly developers. This training is far more extensive than what a user would take. In addition to the training class, consideration also must be given for the hands-on experience required to properly manage a company's instance of Salesforce. No one can simply take an Admin training class, and expect to be proficient at managing Salesforce. But it is an essential start.

Training topics include:

- Basic administration
- Force.com architecture
- Data management
- Profiles, licenses, field level security, permission sets, record security, organization wide defaults, role hierarchy & roles, sharing rules
- Salesforce and marketing automation
- Accounts, Contacts, Opportunities, Products & Price Books, Quotes, Campaigns, Cases, Solutions, Knowledge, Ideas and Answers
- Analytics, including Reports, Dashboards and List Views

Having an internal resource onsite who can manage the system daily, build the security features required, support the users and drive ongoing productivity enhancements, is an absolute necessity if you are to maximize your ROI from Salesforce. Just don't expect to have an in-house expert on hand after a week of training. It can take up to 6 months of training plus external support from the right vendor to get to the point where the internal resource can manage 70%-80% of the day-to-day issues.

Time and Cost considerations:

- Plan for a week of formal classroom style training for Admins and Developers
- Budget around $4000 - $5000 per technical trainee
- Look for instructors that have Salesforce Admin & Developer certifications
- Plan accordingly for the post-training support. Estimates vary widely on this, but a fair approximation would be support from an external partner for 10 hours per week for at least half a year to a year, based on how complex your Salesforce requirements are.

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CONSIDERATION #2 – Does the Training need to be Custom?

One of the great advantages of Salesforce is the ability for it to be customized to pretty much any business environment. No longer just a sales CRM, Salesforce has the ability to be configured to run almost any business scenario. The more the customization however, the more the need for a custom training program.

So which comes first – the training, or the customization of Salesforce? Well, that's likely a decision your organization has already made, whether you realize it or not.

If your company has recently acquired Salesforce and hasn't started doing any configuration, or perhaps weren't even at the point where you had considered it yet, then off-the-shelf training is often a very good option. In fact, one of the advantages of training users on the out-of-the-box version of Salesforce is that they get to use the system immediately. From there, the users can, be the drivers of some of the change requests, as they will identify ways in which to make the system more suited to their environment. This is often one of the best ways to configure Salesforce - when the change requests result from the way the users want it to work for them. This is a great way to drive adoption and have a very user-friendly CRM program.

On-the other hand, if your company has had Salesforce for awhile, and has done some fairly extensive configuration, or if you are using Salesforce for something other than very basic sales and service functionality, chances are good that your training will need to be customized. The training program needs to be designed in such a way that it is showing the users how to navigate around your system, and not a generic version of Salesforce.

Time and Cost considerations:

- Customized training will always cost more than off-the-shelf.
- Most training companies will plan for around 10-20 hours of custom content creation for every 1 hour of delivery. That's on top of the cost of the delivery and the number of people to be trained.
- The right solution for you might be a blend of customized content and off-the-shelf.

Align yourself with an experienced and reputable training partner, who will take time to understand your goals and objectives, provide answers to your questions, and ultimately design the right training program for your business and users.

CONSIDERATION #3 – Should I bring a trainer to our offices?

Generally speaking, onsite training is the better method, purely from a user experience point of view. But it's often not so much better that it justifies the added cost. Virtual training, delivered by a professional training firm with expertise in this area, with a live trainer (not an on-demand video) can be highly effective, both from a learning,as well as a cost standpoint.

The advantages of onsite training are as follows:

- More social, and often more fun (which encourages learning)
- People tend to pay closer attention
- Encourages peer-to-peer support
- Trainer can readily identify people struggling
- Trainer can visually see the participant's screen and provide hands-on demonstrations
- Time during breaks to ask more questions and explore different options
- Trainer gets to actually see the company's working environment
- Trainer can be made available for other meetings with management
- Can be part of a larger corporate function

Of course, all this has to weighed against the costs of onsite training, and ultimately a justification for the added spend.

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Onsite cost considerations:

- Any onsite fees the training partner will charge (anywhere from $1500 per day and up – on top of the regular per person training charges)
- All of the trainer's travel arrangements - flights, hotels, meals and potentially other items as well, such as per diems, travel time, parking expenses, etc.
- Travel, accommodation and feeding of your attendees
- Training room costs

Obviously, depending on the number of people to train, and their location, travel costs will likely be the largest line item in the training budget. For country-wide teams, the decision to have onsite training often rests on whether or not the company is bringing everyone in already for another company sponsored event. For local teams, the decision is really dependent on what your training partner will charge for onsite versus virtual.

Ideally this guide will give you some more insight into the types of classes your organization will benefit from, and an approximate idea of how much to budget for. For a more comprehensive understanding of how Salesforce Training can help your company, please reach out to one of our Training Advisors to discuss your concerns.

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