WHITE PAPER

Who looks after Salesforce once it is live

The build gets the budget, the board's attention and a launch date. What comes after decides whether it was worth it. This paper weighs the four ways organizations look after Salesforce, when each makes sense, and how to run whichever you choose so the system keeps up with the work.

01 What Salesforce needs after go-live

02 What happens when nobody owns it

03 Four ways to look after it

04 When outside support makes sense

05 When it does not

06 Running any model well

07 The decision matrix

08 The first 90 days of support

For
Anyone who runs or relies on Salesforce

Time to read
About 25 minutes

Use it
At go-live, at budget time, or when an admin resigns

A NOTE BEFORE YOU START

Most organizations decide who looks after Salesforce by default.

A great deal of thought goes into choosing and building a system. Very little goes into who will look after it once the project team has gone. That second decision is usually made by nobody, and it is the one that decides whether the investment pays off.

I have watched the same pattern in organizations of every size. The launch goes well. For six months people use the new system and the reports make sense. Then requests start to wait. Someone builds a spreadsheet to get round a problem nobody had time to fix. A new hire is given the same access as whoever sat in that chair before. By the second year, leaders are asking whether they chose the wrong system, when what they actually chose, without noticing, was nobody.

This paper is for whoever has to make that decision on purpose, whatever their title, and whoever signs the budget. It sets out what Salesforce needs after go-live, the honest trade-offs between the usual ways of staffing it, the situations where outside support clearly earns its place, and the ones where it does not.

I run a firm that provides that kind of support, so read the trade-offs with that in mind. I have written them the way I would if you asked me privately. For some organizations the right answer is a strong in-house team and very little from anyone outside.

Sunil Dua
Executive Director and Principal Consultant, Kloudserv

The short version

- A live system is an operating capability, not a finished project. Budget and staff it like one.
- Ownership always stays inside. The work can sit inside, outside or both.
- Judge each model on coverage, depth, continuity, key-person risk and the management time it takes.
- Choose a combination on purpose rather than inherit one.
- Whatever you choose, run it the same way: one route for requests, priorities from the business, visible time, a quarterly review.
- Keep admin access and every account in your own name.

When to use it

At go-live, at budget time, when an admin resigns, or the first time you hear "Salesforce does not work" from someone you trust.

Worth remembering. You can hand the work to someone else. You cannot hand them the ownership.

01 · WHAT SALESFORCE NEEDS AFTER GO-LIVE

A live system is never finished. It needs three kinds of work.

On the day it goes live, Salesforce reflects the organization as it was when the system was designed. From that day the organization keeps moving. New staff arrive and others leave. A membership tier is added. A funder asks for outcomes counted a different way. The annual conference changes format. The board wants a number it has never seen before. The system either moves with the organization or falls quietly behind it.

The work that keeps it moving comes in three kinds, and it helps to see them separately, because they reward different people.

KEEP IT RUNNING

Small, frequent, often urgent

- Users joining and leaving
- Access and permission changes
- Fixing what breaks
- Duplicates, imports, tidy data
- Checking that integrations and scheduled jobs ran

KEEP IT CHANGING

Where most of the value comes from

- New reports and dashboards
- Fields, forms and page layouts
- A new renewal reminder or gift process
- Automations that remove manual steps
- Training for new and existing staff

KEEP IT AHEAD

Rarely urgent, so first to be dropped

- Reading the three Salesforce releases each year
- Access and security reviews
- Planning the next program or integration
- Deciding what not to build
- Keeping licenses matched to real use

Different skills, different rhythms

The first kind rewards someone close to the staff and available every day. The second rewards someone who understands the business and can design a change that will not break something else. The third rewards experience: someone who has seen this platform in many organizations and knows what is coming. Very few individuals are strong at all three, and none of them can be available every day of the year.

That is the heart of the staffing question. It is rarely "can this person do Salesforce?" It is whether each kind of work will actually get done, every month, by someone with the right skill.

> The question is not who can do Salesforce. It is who will do each kind of work, every month, and who will notice when one of them stops.

02 · WHAT HAPPENS WHEN NOBODY OWNS IT

Systems rarely fail. They drift.

Drift is quiet because every step is small and sensible. A request waits a week, so someone finds a way round it. The way round becomes a habit, the habit becomes the process, and two years later nobody can remember why the process works the way it does. No single moment looks like a failure. The sum of them does.

These are the six signs I look for first. Most organizations recognize at least two.

Workarounds become the process

"Do not use that button, it makes a duplicate. Export it and fix it in a spreadsheet." Every new hire is taught the workaround, not the system.

Shadow spreadsheets

The renewals team keeps its own list because the system's list cannot be trusted. Now there are two versions of the truth, and the board sees whichever one was opened last.

Permissions creep

Access granted to fix one urgent problem is never taken back. Leavers' accounts stay active. Few people can say who is able to export the member list or see a donor's giving history.

Reports nobody trusts

Each meeting opens with a debate about the number rather than about what to do. Staff rebuild figures by hand the week before the board meets.

Releases nobody reads

Salesforce updates the platform three times a year. Most changes are harmless. A few retire a feature or change how something behaves. Unread, they arrive as surprises.

Integrations that break quietly

The payments or events connection fails overnight and nobody is told. Weeks later a member asks why their renewal is not showing.

What drift actually costs

The cost is not the software. It is staff hours spent working around the system, decisions made on numbers nobody believes, and a growing unease about who can see what. Eventually it becomes a proposal to replace a platform that was never really the problem. A good share of the "we need a new system" conversations I am invited into turn out, underneath, to be about two or three years with nobody looking after the one they have.

03 · FOUR WAYS TO LOOK AFTER IT

Four models, each right for someone

Almost every organization I meet uses one of four models, or a mix. None is wrong in itself. Each buys something and gives something up.

A full-time admin

A staff member whose job is Salesforce

WHERE IT SHINES

Close to the work and the people. Available every day. Builds knowledge that stays in the building, for as long as they do.

WHERE IT STRAINS

One person's depth has limits, usually in integrations, complex automation and data design. Holidays, illness and resignation leave a gap. Good admins are in demand, and a small organization offers a short career ladder.

The accidental admin

Someone who took it on alongside their real job

WHERE IT SHINES

Knows the business deeply, often better than anyone. No new hire, no new contract. Changes reflect how the work is really done.

WHERE IT STRAINS

Salesforce gets the hours left over, so changes wait. Skills are learned by doing, so gaps in security and design are common. Their real job suffers, and the role is in nobody's job description.

A freelancer

An independent consultant, by the hour or the piece of work

WHERE IT SHINES

Real skill, flexible, often very good value for well-defined work. Many organizations have one they trust and rely on for years.

WHERE IT STRAINS

One person with other clients. When they are busy or away, so is your support. Continuity depends entirely on them, and what they know stays with them unless you insist otherwise.

A support partner

A firm that provides a team, usually monthly

WHERE IT SHINES

Breadth across admin, automation, integration and data. Cover for absences. Continuity beyond any one person. Experience from many organizations like yours.

WHERE IT STRAINS

Further from your daily work, so it needs an owner inside to set priorities and give context. A new partner needs time to learn you. A poor one becomes a queue you cannot see into.

Most organizations end up with a combination, and that is often right: an accidental admin with a freelancer for the harder pieces, or a full-time admin with a partner behind them. The point is to choose the combination on purpose, knowing what each part is for, rather than inherit it from whoever happened to be around at go-live.

03 · THE HONEST TRADE-OFFS

Weigh the whole cost, not the salary line

Budget conversations usually compare one number: a salary against a contract. The real comparison has five parts, and the cheapest model on paper is often the most expensive in the parts that do not appear on an invoice.

	FULL-TIME ADMIN	ACCIDENTAL ADMIN	FREELANCER	SUPPORT PARTNER
Coverage Someone there when needed	Strong on working days; gaps for holidays, illness and vacancy	Whatever is left after the real job	Depends on their other clients	Team cover, within the scope agreed
Depth Range of skills	Strong in core admin; specialist areas vary with seniority	Learned on the job; gaps likely	Often deep in one or two areas	Broad, across a team
Continuity Knowledge survives change	Strong while they stay; a resignation resets it	Weak; little is written down	Tied to one person	Survives individual changes, if the work is written down
Key-person risk	High	Highest	High	Lower; watch that one consultant does not become "the person"
Management time Yours, not theirs	Line management, development, priorities, hiring again when they leave	Hidden; it comes out of their other job and yours	Scoping, chasing and checking the work	An owner who sets priorities and reviews each month

Count the hours honestly

Take an association with 3,000 members and twenty Salesforce users, looked after by its membership manager. Ask her to keep a simple log for a month. If Salesforce takes six hours a week, that is around 300 hours a year, roughly a sixth of her working year, taken from membership work nobody else is doing. And the log shows only the hours she spent. The requests she never reached are not on it at all.

A full-time admin gives you something like 1,800 working hours a year once holidays and leave are taken out. But they are one person's hours, at one level of skill. The real question is whether your system needs a steady full week of the same kind of work, or an uneven ten to thirty hours with peaks, quiet months and the occasional specialist problem.

Then put a number on your own time. If a freelancer needs two hours a week of scoping and chasing from your operations director, that is around 100 hours a year of senior time that never shows up in the Salesforce budget.

04 · WHEN OUTSIDE SUPPORT MAKES SENSE

Six situations where it clearly earns its place

Outside support is not the answer to every staffing question. In these six situations, though, it is usually the most sensible choice, and often the one the people closest to the system would pick themselves.

No one whose job is Salesforce

The accidental admin is doing two jobs and doing both in the gaps. Requests wait on one person's spare hours, and the system knows only what they had time to learn.

What changes. They get their real job back and become the person who sets priorities, which is the part only they can do.

The admin left, or you are hiring

Hiring a good admin often takes longer than most organizations expect, and the system does not pause while you recruit. Renewals still go out. Integrations still fail.

What changes. Cover from the first day, instead of a hire, alongside one, or while you recruit. The new person starts with a clearer picture of what they inherit.

One admin, stretched

Your admin spends the week on access requests and small fixes and never reaches the backlog. Nobody covers their holidays. They are usually the first to say so.

What changes. A team behind them for the specialist work and the overflow. The admin stays the person who knows your business, with time to use it.

Live, but the partner has moved on

The implementation partner was hired to build, not to run. The project closed, the handover was a meeting and a folder, and nobody owns what comes next.

What changes. Someone learns what was built, picks up the open questions, and gives the system a rhythm of care rather than a series of rescues.

Help that is hard to reach

A freelancer who takes days to reply, or a provider where requests disappear. The issue is rarely skill. It is continuity and visibility.

What changes. A team rather than one person, and one place to see every request and where it stands.

Paying for more than you use

Licenses and features sit idle: a portal nobody turned on, dashboards never built, staff still working from spreadsheets beside the system they pay for.

What changes. Help to use what is already paid for, and an honest view of what to drop at the next renewal.

> The common thread: the work has outgrown the time or the range of the people doing it. That is a capacity question, and it says nothing about how good they are.

04 · FOUR MORE THAT ARE OFTEN MISSED

The moments when the load changes shape

Seasonal peaks

Renewal season, the annual conference, year-end giving, the grant reporting cycle. A single admin sized for the average month is overwhelmed at the peak. Outside help, planned two months ahead, absorbs it.

A merger or a new program

Bringing chapters together, launching a certification program, opening a new fundraising stream. Short bursts of design work that a team built for steady running is not set up to carry.

Audit, board or funder scrutiny

An auditor asks for an access review. The board asks who can export member data. A funder asks how outcomes are counted. An outside review gives an independent answer, and a list of what to fix.

Preparing for AI

AI tools are only as good as the data and access rules underneath them. Before anything is switched on, someone needs to clean the data, agree definitions and tighten who can see what. Specialist work, mostly done once.

05 · WHEN IT DOES NOT

And four cases where I would not recommend it

You already have depth inside. Two or more capable people who cover each other, a system that is written down, and a manager who sets priorities. You may need a specialist now and then for an integration or a release review. Buy that as a piece of work, not a monthly arrangement.

Your system is small and stable. A handful of users, one main process, little change from year to year. A trusted freelancer for a few hours a quarter may be all you need.

Nobody inside will own it. Support without an internal owner becomes an expensive inbox, working through requests with no sense of what matters. Name the owner first. It does not have to be a technical person, and it rarely needs more than an hour or two a week.

What you need is a project, not support. A rebuild, a new system or a major redesign belongs in a scoped project with its own budget and sign-off. Running it through monthly support hides its true size from the board, and crowds out the everyday work support exists to do.

> A good adviser should tell you when you do not need them. If you only ever hear yes, keep asking.

06 · RUNNING ANY MODEL WELL

Six habits matter more than the model you pick

I have seen a single accidental admin run a system well, and a large partner run one badly. The difference was almost never the model. It was whether these six habits were in place.

1 **One named owner inside**

A leader, not necessarily technical, who sets priorities, accepts changes, and answers for the health of the system. Put it in their job description. Without this, every other habit fades within a year.

2 **One route for requests**

Email or a simple form into one list. Not hallway asks, texts and side conversations. Every request gets a reference, an impact the person asking sets, and a status in plain words that anyone can check.

3 **Priorities set by the business**

The owner ranks the backlog with department heads each month. Decide in advance what "urgent" means: something stopping staff from working, or touching members, donors or money. Write it in one paragraph.

4 **Visible time and a record of change**

Whoever does the work, you should be able to see where the hours went and what changed, why and who approved it. For staff admins as much as for partners. A month of honest logging is often an eye-opener.

5 **A quarterly review**

An hour with leadership: what changed, what is waiting, what the next Salesforce release brings, what the coming quarter needs (a renewal season, a conference, a board cycle), and whether the model still fits.

6 **Access and accounts in your name**

Two of your own people with admin rights. Named logins for anyone outside, never a shared one. Integrations running under an account you own. Access removed the day someone leaves. Our paper *Owning your systems* covers this in depth.

Signs it is not working, whatever the model

- You hear about time spent only when the invoice or the timesheet arrives.
- The same problem is fixed twice, by different people, in different ways.
- Nobody can say what changed in the system last month, or who asked for it.

> Good support is boring in the best way. Requests go in, things get done, and once a quarter you decide what is next.

07 · COPY THIS

The decision matrix

Tick each statement that is true for your organization today. For every ticked row, score 2 for a full dot and 1 for a half dot in each column. Do it with your leadership team, not alone.

● Strong fit (2) ◐ Can work (1) Blank: poor fit (0)

TRUE?	YOUR SITUATION	FULL-TIME ADMIN	ACCIDENTAL ADMIN	FREELANCER	SUPPORT PARTNER
☐	There is steady Salesforce work to fill most of a working week, every week	●			◐
☐	The work is uneven, with seasonal peaks and quiet months		◐	◐	●
☐	You regularly need specialist work: integrations, complex automation, data design	◐		◐	●
☐	Most Salesforce work is the daily process of one or two teams	◐	●		
☐	Your system is small and stable, and changes rarely		●	●	
☐	Someone on staff knows the business well and has real time to give it	◐	●		◐
☐	A manager has time to hire, develop and keep a technical specialist	●			
☐	You need cover for holidays, illness and departures, so one absence cannot stall renewals, gifts or reporting				●
☐	The team has little time to scope, chase and check the work	◐			●
☐	You want day-to-day knowledge to live inside the building	●	◐		
☐	Most needs are defined, one-off pieces of work			●	◐
	Your totals				

How to read it

The highest column is your starting point, not your answer. If two columns are close, you are probably looking at a combination: a full-time admin with a partner behind them, or an accidental admin with a freelancer for the harder pieces.

Two checks before you decide

Who is the named owner inside, and how many hours a week can they give? And what happens on the day your key person is away? If either answer is uncomfortable, the matrix has not finished its work.

08 · COPY THIS

The first 90 days of support

Use it with any partner, freelancer or new admin. The first three months set the habits for the next three years.

WHAT SHOULD HAPPEN	WHO	DONE
BEFORE DAY ONE		
Name the internal owner, and a back-up for when they are away	You	☐
Confirm two of your own staff hold admin rights, and every account and license is in your name	You	☐
Create named logins for the support team; no shared accounts	You	☐
Agree one route for requests, and tell staff how to use it	Both	☐
Write down what "urgent" means, in one paragraph	Both	☐
DAYS 1 TO 30: LEARN AND STABILIZE		
A review of the system: users and licenses, access, automations, integrations, recent failures	Support	☐
A short plain-English note of what the review found and what needs a decision	Support	☐
One ranked priority list, agreed with department heads	You	☐
Leavers' accounts and unneeded access removed	Both	☐
The top two or three priorities started, alongside everyday requests	Support	☐
DAYS 31 TO 60: FIND THE RHYTHM		
A first monthly summary: requests closed and open, time used, what changed	Support	☐
A record of changes started: what, why, who approved	Support	☐
Integrations and scheduled jobs checked on a routine; failures reported to the owner	Support	☐
The next Salesforce release read for anything that affects you	Support	☐
Priority list re-ranked with the business	You	☐
DAYS 61 TO 90: REVIEW AND DECIDE		
The first quarterly review with leadership	Both	☐
Check: have the oldest waiting requests moved?	You	☐
Check: can you see where the time went, without asking?	You	☐
Check: ask three staff how to raise a request and what happens next	You	☐
Decide: keep going, adjust the scope, or change course	You	☐

If you are starting with a new in-house admin, the same list works. Read "Support" as the new hire, and give them the first 30 days to learn before you judge the backlog.

WHAT TO DO NEXT

Two steps, this month

01 Answer two questions in writing

Who looks after Salesforce today, and who owns it? If the answer to both is the same busy person, or nobody in particular, you have found the gap. Write the honest answer down and share it with your leadership team.

02 Fill in the matrix together

Take the decision matrix to your next leadership meeting, or to budget planning. Twenty minutes, one page. The conversation it starts is worth more than the score.

Whichever model you choose, the organizations that get the most from Salesforce have one thing in common. Someone inside decided, on purpose, how it would be looked after, and checks every quarter that the decision still holds. That is a leadership choice, not a technical one.

IF A SUPPORT PARTNER IS ON YOUR LIST

How Kloudserv support works

Requests come in by email or through a portal and are acknowledged at once with a case number. Our team picks them up the same business day, with urgent issues first, and you set the impact. Statuses are in plain words, and you can see the hours used and remaining at any time. A certified Salesforce team, with more than 80 implementations behind it.

94% of day-to-day admin requests resolved within 24 hours of being raised, from our support records for a national association.

Use the 90-day checklist with us, or with anyone. A partner worth keeping will welcome it.