

## BUDGET CHECKLIST

# QUESTIONS TO ASK WHEN BUILDING YOUR BUDGET FOR SALESFORCE



Constant changes with Salesforce, and business goals within your organization can understandably make it difficult to keep up with maintenance and innovation of your existing Salesforce investment. So when it comes to budgeting for Salesforce annually, we want to ensure you get the most value.

This questionnaire, broken out by the following themes, is to help you prepare your Salesforce budget. Answering these questions can shine a light on your level of budget and process readiness to light the path to success. As you document answers to each question elsewhere, you get the satisfaction of checking a box.

## 01 STRATEGIC PLANNING

These questions are a quick guide to your organization's maturity level and its approach to Salesforce planning. If you don't have a process, now's a great time to get one together.

- Do you have a budget process defined for your Salesforce needs?
- Does your organization have 2023 goals or long-range plans that Salesforce is a material component of success?
- Can you further describe how Salesforce will help contribute to the 2023 and longer-range goals?
- What does success mean to you and your stakeholders for Salesforce in the next 12-18 months?
- What goals are you personally trying to achieve in 2023 within your role?
- Have you broken down your Salesforce investments into a roadmap/timeline yet?

**02 TACTICAL NEEDS**

Take a closer look at what Salesforce end-users need to validate you've got sufficient funds to take care of any immediate needs.

- Is your organization pursuing any new industry certifications which may require diligence with Salesforce?
- Are you familiar with Salesforce's technical and product roadmap for the next 12 months and how that may impact your business? (i.e., SSO requirements, enhanced domains, process builder deprecation, new privacy features, new applications and features, Slack)
- Do you foresee any new systems with which Salesforce will integrate with next year?
- Do you have details on expected support needs vs. project and innovation work?
- Have you met with your Salesforce stakeholders to validate their roadmap aligns with yours?
- Do you have user feedback indicating improvements to systems and processes are needed? If so, have you budgeted for those updates?
- Is anything broken that requires repair?
- Do you currently have a backlog or list of desired enhancements that you'd like to make substantive progress next year? How will this be accomplished?

**03 EXPECTED CHANGES**

- Do you have known projects on the horizon, and have they been estimated?
- Do you foresee any staffing needs or changes to maintain your Salesforce infrastructure?
- Are any significant hires or company structure changes planned within the next 12-18 months?
- Is your organization going through a round of funding, merger, or acquisition in the next 12-18 months, or has it completed one in the past that is still being integrated?
- Are global events impacting your business at all? If so, how could technology help maximize outcomes?

**04 RISK MANAGEMENT / MITIGATION**

- How have you controlled costs in the past?
- Do you foresee any major risks that need managing?
- Are there any new compliance or other regulatory changes within your organization?