

Budgeting: Assessment Tool

Assessment

- Do you have a 2021 budget defined?
- How have you controlled costs in years past?
- Do you feel like your Salesforce instance is adding value?
 - Is a return provided? How?
- Do you know what Salesforce changes are coming?
 - Have you budgeted for them?
- What opportunities are you looking to take advantage of in 2021?
- How are you communicating with your clients?
 - Do you feel it is an effective strategy?
 - Do you need to increase customer service / support?
- Do you have a forecasting plan defined?
- Historically, how do you plan for Salesforce changes as they impact your org?
- Has your staff changed in the last 12 months, foresee it changing in the next 12 months?