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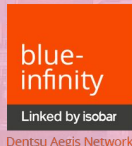
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Barcelona 2018



From #AwesomeAdmin to Awesome Consultant

Melinda Smith & Jason Guthrie



Melinda Smith

Melinda Smith is a Colorado girl with a deep love for the Salesforce platform. She started her Salesforce journey as an admin then moved to the wild world of consulting. She co-leads the Denver User group, she's an artist & a part-time comedian on the Two WIT podcast. She sits on the board of the WITness Success team that brings the ecosystem the only women focused community event. She is passionate about her Salesforce community & would be utterly lost without them. #Ohana



Jason Guthrie

Began working with Salesforce as an administrator for a large health care company in the US. After five years, he left to pursue a career as a Salesforce consultant, working as a Solution Architect with Bluewolf. Having been a mentor, manager, and Director of Solution Architecture, Jason now leads the Solution and Technical Communities for Bluewolf with responsibility for global processes as well as solution and technical quality.



So you're ready to move from an admin
role to a consultant role!?

There are so many things that will change



5 Steps to Success

Time Mgmt

This is a bit different in a consultant role.

Advise

You become an advisor to many over 1 client.

SOW

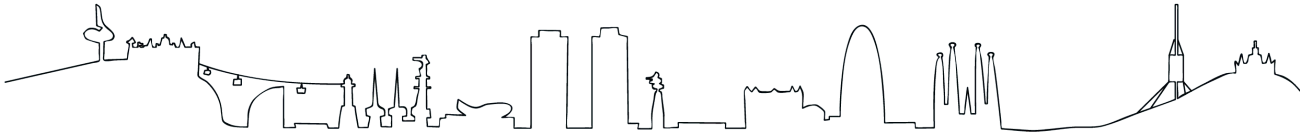
Your tasks become deliverables in shorter time.

Communication

It is as critical now as it was before.

The Rest

Set yourself free!

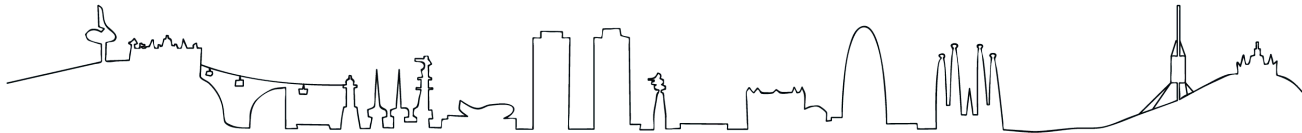


Admins are Consultants in Training

A consultant in disguise..

SABWA, Sandboxes, Project Management

- Salesforce Admin By Walking Around - gathering user info, requirements, they lean on your expertise
- Sandbox - iterations, testing, deploying
- Managing expectations



Differentiators

As an admin...

You own your org. You are the gatekeeper & the final decision maker (or team)

You are in an office with others, fitting your life to you job

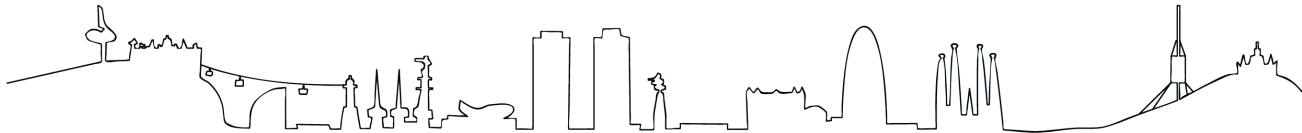
You have control of the timeframe for new config or clean-up.

As a consultant...

You are often in many orgs & won't know all of the ins and outs

You have the flexibility to work hours that fit your lifestyle.

Hours are money. You are on someone elses time table.

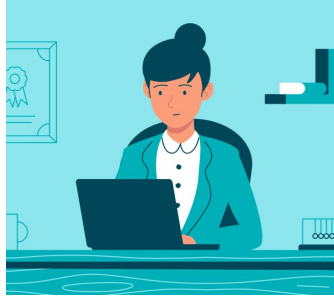


Take Aways



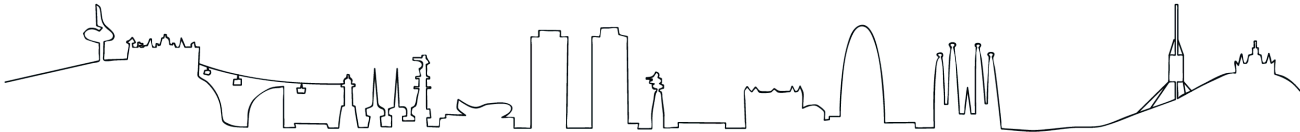
Manage Your Time

- Be conscientious of allotted time
- There is no more “I’ll do it tomorrow”
- Plan twice, cut once
- Mismanagement of time can lead to working for free
- Working from home or working at client site
- Be prepared for change



Advise

- You are no longer the employee, you’re now the expert
- They are paying you to tell THEM what to do
- Be sure, be confident, be willing to counsel
- In the end, the client makes the decisions



Takeaways



New Scope of Work

- Tasks become deliverables, are written down and given a timeline
- There is no backlog (typically), If time will not allow for all asks, approach client/PM sooner than later.
- Your documentation (SOW, User stories, etc) will be your source of truth

Communication

- Explain yourself, You're going to be gone, teach them how to manage what you did
- Be laboriously detailed and clear, leave no room for the client to 'guess' what you mean. They often have never seen Salesforce
- In the end, the client makes the decisions



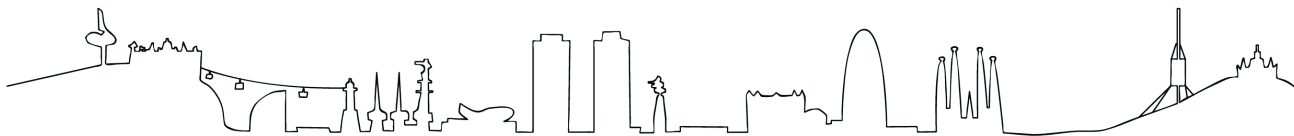
Takeaways



What Others Won't Tell You

- The struggle to let go at first
- The client may not love your design (agreed to it but not love it are 2 different things)
- Learn from others, mistakes, cranky clients,
- Be self driven
- Invest in your own skills
- Manage distractions - changing to working at home comes many opportunities to distract
- Reach out, don't be an island

Muchas Gracias!



Q & A



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