



Sharin Pix

ActiveCampaign >

 Cirrus Insight®

Solo  
Admin/Consultant

Rescuing an Org  
(Your First Days)

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Paul Ginsberg

# AGENDA

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- Intro
- Prep Work
- Who You Should Talk To
- Takeaway Strategies
- Top Tips

These slides will be available afterwards



# PAUL GINSBERG - "FACILITATOR"



- Independent Consultant/Freelancer
- Nonprofit/Small Business Specialist
- 6 Certificates / Approx 150 Badges
- Helped run the Amsterdam User Group (2017-20)
- Published author for Salesforce & SalesforceBen

 NaturallyPaul

LinkedIn - please always send a note  
e.g. "I heard your presentation/chatted  
with you"



# ADMIN OR CONSULTANT?

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# HOW'S OUR CUSTOMER?

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# THE PREP WORK

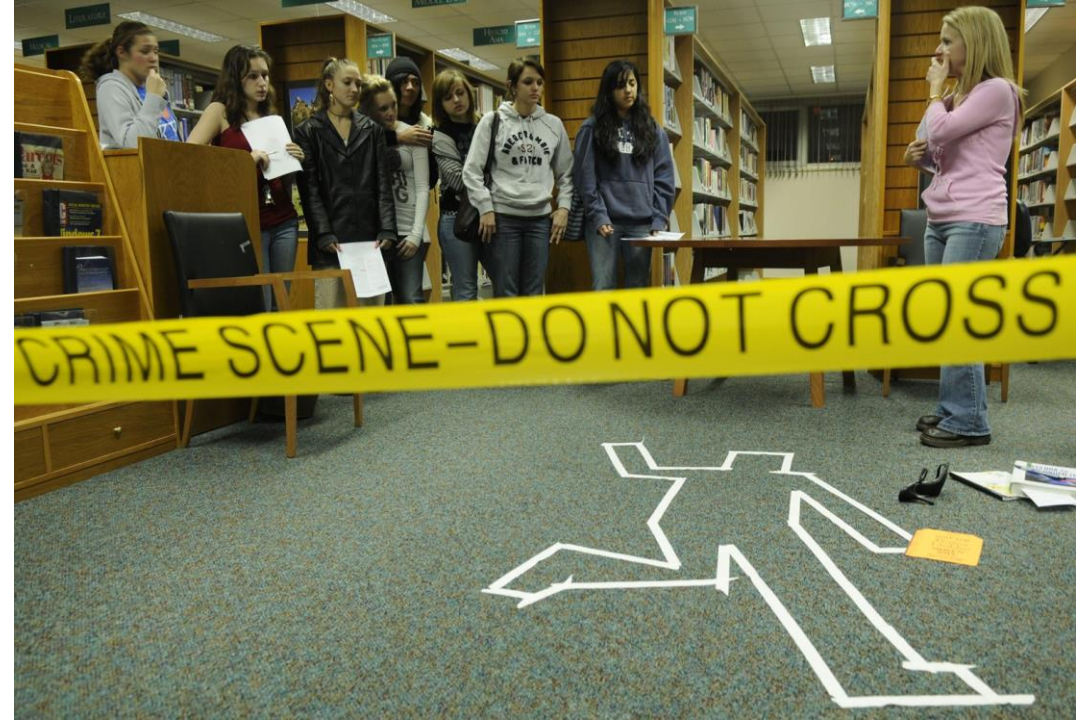
- Before you arrive
- The importance of solid foundations



# DAY 1: WHO YOU SHOULD TALK TO

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- Management
- Your Predecessor
- Your Nemesis!



# HIDDEN ADVANTAGES: PERSPECTIVE

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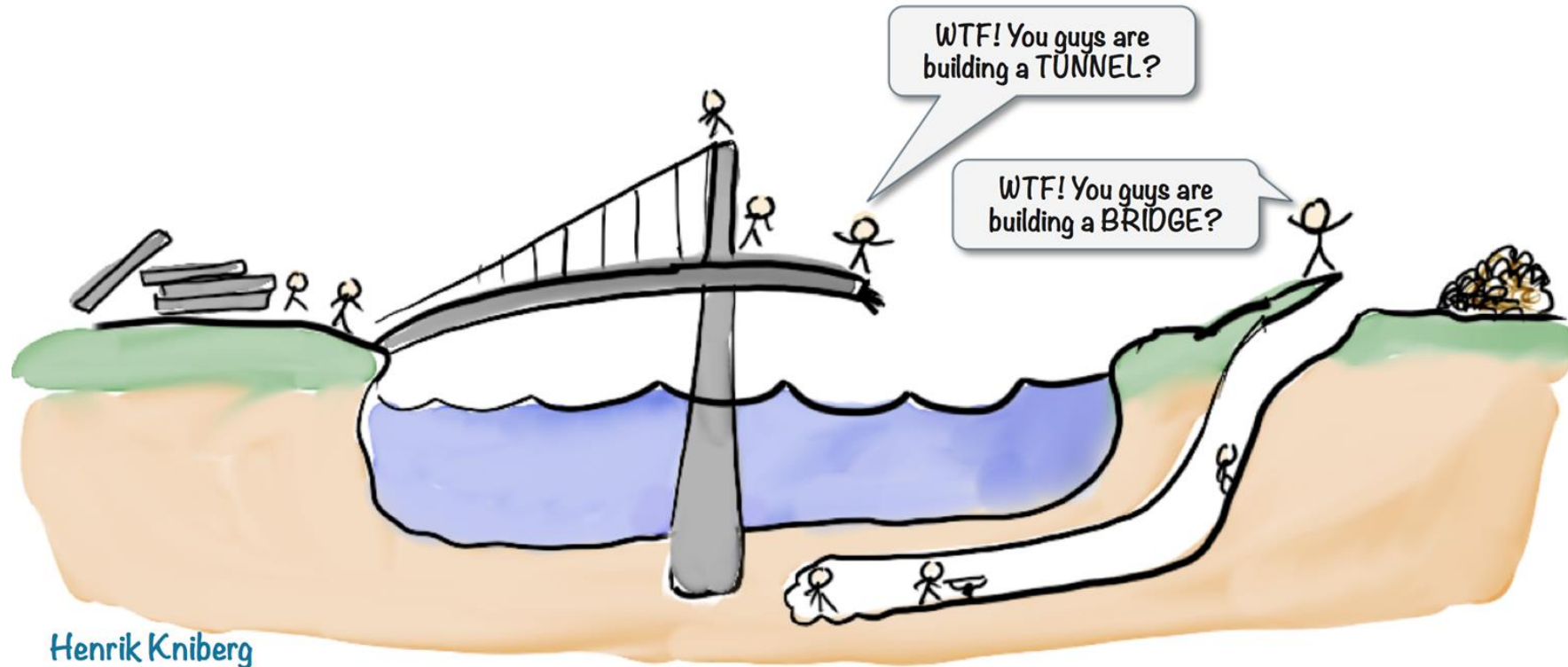


Photo Credit: St John's Wood, London, courtesy of RAC



# REALITY (ON A GOOD DAY...)

## Misalignment



# BACKUPS

The screenshot shows the Salesforce Setup interface for configuring a Data Export job. The left sidebar shows the navigation menu with 'Data Export' highlighted. The main content area is titled 'Schedule Data Export' and contains the following configuration options:

- Export File Encoding:** ISO-8859-1 (General US & Western European, ISO-LATIN-1)
- Include images, documents, and attachments:**
- Include Salesforce Files and Salesforce CRM Content document versions:**
- Replace carriage returns with spaces:**
- Frequency:** On day 1 of every month (selected), On the 1st Sunday of every month
- Start:** 05/03/2021
- End:** 05/04/2021
- Preferred Start Time:** --None--

At the bottom, the 'Exported Data' section is titled 'Select what types of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.' The 'Include all data' checkbox is checked and circled in red. Other data types listed include Contract, Approval, Order, ContractContactRole, OrderItem, and RecordType.



# SUMMARY

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- Transparency
- Be an Advisor: it is likely to go beyond Salesforce
- Reporting
- Training
- Prototype

# HAPPY LIFE PARTNER!

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# SOME FURTHER RESOURCES

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- [Salesforce V2MOM](#)
- [CloudJohann.com](#)
- [Forcepreneur.com](#)
- My blog  
[naturallyiq.com/blog](#)

THIS SLIDE DECK:

[https://bit.ly/your-first-days](#)



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THANK YOU!

PAUL GINSBERG  
@NaturallyPaul

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