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## Test Your CRM Management and Administration IQ

– David Taber, CIO

September 16, 2013

The story's as old as system administration: Some parts of the job are straightforward and risk-free, but other tasks are fraught with high error rates and nasty consequences.

Think back to the infamous `rm -rf *` command that erased most of [Toy Story 2](#) before it ever made it out of Pixar. Or go further in time to the Bell Labs study of UNIX users' made mistakes with shell scripts. The vast majority of the mistakes involved the IF statement.

Think things have changed that much with today's all-GUI, all-the-time model of system management?

### 8 Common CRM Management Issues

I've been tracking the errors my clients and my own people make when managing CRM systems. An amazing number of [CRM mistakes](#) fall into just a few categories.

Here they are, in no particular order, along with a set of "IQ test" questions you can ask your team to reduce the likelihood that errors surface in the first place.

1. Fuzzy ideas about the CRM system's object model, and the consequences of record types, constraints and lookup versus master-detail relationships.  
*Question: What are the disadvantages of using master-detail in your system?*
2. Weak understanding of table joins and how they work.  
*Question: How do you create a report showing only the companies that don't have any employees?*
3. An almost complete misunderstanding of [CRM system security primitives](#) such as roles, profiles, groups, queues and sharing rules.  
*Question: How could you set up an object (no code allowed) so that it's generally read/write but that, when it reaches a particular status, some users will be able to edit it, some will only be able to read it and some won't be able to see it at all (even in a search or report)?*
4. Confusion when using formulas, particularly when mixing different data types.  
*Question: Why won't `IF (Date=)` ever be true?*
5. A real weakness with compound Booleans.  
*Question: Write the expression that will yield TRUE for even hours of the day during most years but for odd hours during leap years.*
6. Difficulty working with dates and times.  
*Question: Write a formula that computes the number of business hours between, say, Thursday at 3 p.m. and Monday at 10 a.m.*
7. Chronic inability to set up time-based workflows that will take action if there's no activity and a deadline expires.  
*Question: Set up a workflow that records when a status field changes its value and sends an*

*alert if the value isn't changed again for 30 days.*

8. Anything regarding Regular Expressions.

*Question: How do you write a Regex filter that will flag a "CxO" job title such as CEO, CFO or COO no matter where it appears in a job title string?*

**How-to: [Avoid 3 CRM User Identity Mistakes](#)**

## The 12 Places CRM Management Issues Appear

Now, where do these issues show up most frequently, and where do they cause the most glaring problems? In amusing places, it turns out:

1. Reports that show misleading results because the set of records isn't filtered properly.
2. Reports that show lots of repeated details because of improper joins or failure to use group-by's.
3. Validation rules that don't fire under correct conditions or prevent users from saving legitimate records.
4. [CRM workflow rules](#) that don't fire predictably or yield incorrect results.
5. Calculated fields with ridiculous values.
6. [CRM security rules and record-sharing practices](#) that don't give people the correct privileges or visibility.
7. Information leakage or security issues.
8. Requirements for code where a simple formula or roll-up field would work.
9. Inability to share objects or records across groups.
10. Invisible data and misrouted leads.
11. [Data quality problems](#) such as duplication.
12. Incredible amount of wasted user and system admin time in troubleshooting and (mis-)training.

## Teach Your Children Well; Employees, Too

If some of these issues sound familiar, your administrators may need to brush up on Nos. 1 through 3 in the first list. Nos. 4 through 8 are the more interesting problems. Some seem to be only partially "teachable," as they're tightly related to math and logic aptitude. I've seen the same weaknesses show up in Excel formula writing — particularly involving compound Booleans, VLOOKUPs, and pivot tables— so skills in these areas might be improved by taking an advanced Excel course.

### Commentary: [Why CRM Implementation Needs Training Wheels, Not Racing Gear](#)

If these math and logic skills aren't strong enough in the adult world of sys admins, then what can we tell our kids to do in high school or college? It's not like a trigonometry or chemistry course is going to help much. Probability and statistics? Sure. Accounting, algebra and analysis? Absolutely.

But the core skills are going to be most directly developed in business classes that use spreadsheets and databases extensively. If the courses require the development of macros that teach elements of programming, that's even better. As these classes are available at nominal cost in most community colleges, they're "within reach" for most young adults, even those attending night school.

*David Taber is the author of the Prentice Hall book, "[Salesforce.com Secrets of Success](#)" and is the CEO of [SalesLogistix](#), a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel and India. Taber has more than 25 years of experience in high tech, including 10 years at the VP level or above.*

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