

The Salesforce Implementation & Optimisation Checklist

Salesforce implementation is only the beginning.

As businesses evolve, platforms naturally become more complex. Processes drift, integrations expand and data quality challenges begin to impact reporting, adoption and efficiency.

This checklist is designed to help organisations assess both implementation readiness and long-term platform health, ensuring Salesforce continues to deliver value over time.



CRM Objectives

Setting objectives before you start your implementation will ensure the best ROI and that your implementation best fits your business needs.



Who are your key stakeholders for your Salesforce implementation?

Who needs to be involved in this project?

- **Decision Maker** - who will make all final decisions?
- **Project Manager** - who will be responsible for pushing the project towards your goals?
- **Super Users** - who are going to be your biggest fans?
- **End Users** - which individuals will regularly use Salesforce?



What are your main objectives when implementing Salesforce?

Answer these key questions:

- What does success look like?
- What are some of the pain points that the team faces regularly?
- Which parts of the day-to-day tasks feel inefficient?
- Which processes are currently going well that you would like to mimic in Salesforce?



What timeframes are you working towards?

How long will your implementation take?

- Are there any business critical events which will effect your roll-out timescales?
- How long will it take to train all of your users?



Who is Going to Implement?

Are you going to self implement or use a partner?

Any organisation using Salesforce needs some kind of implementation to get the system set up and to tailor it to their unique business needs. A key decision in the process of implementation is deciding whether to use a Salesforce implementation partner or go it alone. Ask yourself the following questions to help make this vital decision:

Knowledge

Do we have the skills in house to self implement and does that person have the time to devote to the project?

Timescales

Do we have tight timescales which would be easier to meet if an experienced consultant was driving the project?

Budget

Would the cost be lower if we use a partner for the project versus employing an admin full time?

Long-Term Plan

Is our business likely to change and adapt over time and can we create a system that supports that change in house?

Questions to ask your Salesforce Partner

- Do you have experience in our industry and with companies of a similar size?
- Do you have experience of the Salesforce clouds we are looking to implement?
- What is your implementation methodology?
- What is your Salesforce CSAT score and can I see some reviews or speak to a customer?
- Who will be working on my project and how do we work together?



Define and Prioritise Requirements

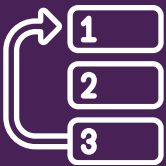
What specific functions does Salesforce need to perform to meet your company objectives?

We've defined our goals, timescales and who is going to be involved in our Salesforce implementation. The next step is to gather our requirements. If you are working with a partner they will take you systematically through a discovery workshop to assess the current situation and document the requirements. What kind of things do you need to think about?



Sales representatives often spend a significant portion of their time on non-selling tasks, such as data entry and lead qualification. AI can automate these tasks, freeing up your sales team to focus on building relationships and closing deals.

Understand the pain points for each department, which processes cause the most issues and where are costly mistakes made? Can any of these mistakes be avoided through automating tasks?



Next you need to prioritise the requirements based on their importance and feasibility. You can use techniques like MoSCoW prioritisation (Must have, Should have, Could have, Won't have).

Document the requirements in a clear and concise manner including the business needs, functional requirements and technical requirements. You can use tools like user stories, use cases, or process flow diagrams.



Validate the requirements with stakeholders to ensure that they accurately reflect their needs and expectations. This can be done through review meetings or by creating mockups to demonstrate how the system will look

Prepare Your Data

The right data is essential to ensure success for your implementation.

Preparing data for a Salesforce implementation can be a critical and time-consuming process, but it is essential to ensure the success of your implementation. Here are some general steps that can be taken to prepare data for a Salesforce implementation.

1**Identify the data sources**

Determine the data sources that need to be integrated with Salesforce. This could include data from existing CRM systems, spreadsheets, databases and other sources.

2**Analyse data quality**

Analyse the quality of data in the existing data sources. Identify data fields that are missing or have incorrect data.

3**Cleanse data**

Cleanse the data by removing duplicates, correcting errors and filling in missing data. This can be done manually or by using tools such as data cleansing software.

4**Map the data**

After cleaning and de-duplicating the data, map it to the corresponding fields in Salesforce. This ensures that the data is properly organised and easily accessible within Salesforce.

5**Determine data ownership**

Assign data ownership to ensure that the right people have access to the right data. This includes determining who owns the data, who can edit it and who can view it.



Ongoing Optimisation and AI Readiness

Salesforce implementation is not the end of the journey. As businesses evolve, platforms naturally become more complex over time.

Use the questions below to assess whether your current environment is still aligned to your business needs.

Platform Optimisation

- ☐ Have your Salesforce processes been reviewed within the last 12 months?
- ☐ Are users relying on manual workarounds outside of Salesforce?
- ☐ Are there areas of the platform that teams avoid using due to complexity?
- ☐ Is your Salesforce environment still aligned to your current business processes?
- ☐ Have reporting requirements evolved beyond your current setup?

Data & Reporting

- ☐ Is reporting trusted across departments?
- ☐ Are duplicate or inconsistent records impacting reporting accuracy?
- ☐ Is data ownership clearly defined across systems?
- ☐ Are integrations maintaining reliable and consistent data?
- ☐ Is your data quality strong enough to support automation and AI initiatives?

Integrations & Scalability

- ☐ Are your Salesforce integrations still fit for purpose?
- ☐ Have additional systems or tools introduced unnecessary complexity?
- ☐ Are integrations documented and properly maintained?
- ☐ Can your current Salesforce setup scale with future business requirements?

AI & Future Readiness

- ☐ Do you have confidence in the quality of the data feeding your AI initiatives?
- ☐ Are your processes standardised enough to support automation?
- ☐ Is your organisation clear on where AI could create genuine operational value?
- ☐ Have you assessed whether your Salesforce environment is ready to support future AI capabilities?

Implementing Salesforce

A thorough, well planned, Salesforce implementation can ensure you getting the most from the platform and maximise its benefits. It will streamline your sales processes, automate tasks, and improve collaboration between teams. This can lead to increased productivity, better customer experiences, and ultimately, increased revenue. Following our tips can help to avoid costly mistakes and mean you are up and running quickly with the right results.

Xenogenix

Xenogenix have been a Salesforce partner since 2007 helping customers in hundreds of Salesforce implementations. We are immensely proud to have one of the highest Salesforce CSAT ratings in the industry, 4.9/5. We forge long term relationships that not only deliver on ROI and exceed our customers expectations but drive revenue and improve our customers experience.

As one of the only partners in the UK to specialise in multi-cloud implementations, Xenogenix focus on the design, implementation, maintenance and support of multiple Salesforce clouds and products including Sales & Service Cloud, CPQ, FSL, FinancialForce, Account Engagement and many additional add on Appexchange partner apps.



Need help assessing your Salesforce environment?

Whether you are planning a new implementation, reviewing an existing setup or preparing for future AI initiatives, Xenogenix can help identify risks, gaps and opportunities across your Salesforce platform.

