



Releases - Spring, Summer, Fall

Each release brings new features and opportunities to improve business performance.

Data Backup - Weekly Data Cleanse - Quarterly Data Archive - Annual

Backup. Each week, the Salesforce org can perform a backup to ensure data recovery.

Cleanse. Each quarter, the data set should be audited to ensure all data & reporting is accurate.

Archive. Each year, items that are not in the backup should be archived.

Dreamforce - Before & After

Dreamforce is the single largest opportunity to advance your use of Salesforce.

System Review - Monthly

Review user & security settings. Review lead and opportunity stages to improve business process.

Sales Productivity Improvement

Investigate how the sales people do their work and implement tools like power dialers, email templates, Conga, SalesforceIQ, and Docusign to make sales fast and nimble.

Security, Access & Visibility Improvement

Review data create/read/edit/delete rights and user access via roles, profiles & permission sets.

Sales Process Improvement

Review the business process of sales to align with best practice and then configure Salesforce to enable and empower sales.

Dashboards & Reporting

Give everyone a dashboard and reports that enable their success at every step.

Data Capture & Lead Management Improvement

All data needs to be captured in Salesforce, starting with leads. Leads need to be properly segmented by source, status and territory.

Quotes & Price Book Improvement

Price books, Conga and SteelBrick CPQ can greatly streamline the quoting process to increase sales and reduce mistakes.