Salesforce Implementation Checklist

Xenogenix have supported hundreds of customers with Salesforce implementations, this step-by-step guide is based on our experiences in planning and implementation for the best results.

PARTNER SINCE 2007

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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?

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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 to is 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?

Start by asking each department to compile a list of their responsibilities, recurring tasks, sales processes and workflows. You can do this through interviews, surveys, workshops and other techniques.

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

Identify Needed External Integrations

Do you need to integrate with any external systems?

Now we have prioritised our requirements and understand what we need to get from Salesforce, we may have identified external systems we need to integrate. This may include marketing automation tools, customer service software, ERP systems, HR management systems and more.

What kind of systems can integrate with Salesforce?

- **Sales prospecting tools** - such as LinkedIn Sales Navigator or Zoom info
- **Document generation and eSignature**- such as CongaCreator and CongaSign
- **Marketing automation systems** - such as HubSpot and Pardot
- **Customer service systems** - such as Zendesk and Freshdesk
- **ERP and accounting systems** - such as Xero and QuickBooks
- **E-commerce platforms** - such as Shopify, Magento and WooCommerce
- **Collaboration and productivity tools** - such as Microsoft Office 365 and Slack

Questions to ask about any integrations

Does data flow from Salesforce to other systems or from other systems into Salesforce?

What type of data is being transferred (e.g. customer data, financial data, order data, etc.)?

Do you need to sync data between Salesforce and other systems in real-time or near-real-time?

Are there any manual data entry tasks that can be automated by integrating Salesforce with other systems?

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.

Plan Your Change Management Strategy

Managing change can be vital for successful adoption.

Effective change management is critical to the success of a Salesforce implementation as it helps to ensure that the system is adopted quickly and efficiently, minimising disruption and maximising ROI.

How do we manage change?

Develop a clear communication plan.
Communication is key to ensuring a smooth transition. Establish a clear communication plan that outlines the purpose of the change, the benefits and the timeline.

Create a training plan.
Training is crucial for the successful adoption of the Salesforce platform. Develop a comprehensive training plan that includes training sessions, online tutorials and resources.

Involve stakeholders early on.
Involve stakeholders in the planning and implementation process from the beginning. This will help ensure that the Salesforce implementation meets their needs and that they are invested in the success of the project.

Identify and address resistance to change.
Resistance to change is common but it can be addressed through proactive communication, education and engagement.

Measure success.
Establish clear metrics for measuring the success of the Salesforce implementation. This will help identify areas for improvement and ensure that the project meets its objectives.

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Final Checklist

Have you completed the tasks?

Tick the tasks off as you complete them.

CRM Objectives

- [ ] Key Stakeholders are identified
- [ ] Set CRM implementation objectives
- [ ] Determined project timelines

Who Will Implement?

- [ ] Decided to use a partner or self implement
- [ ] Selected the partner that suits us

Define and Prioritise Requirements

- [ ] Key requirements identified
- [ ] Requirements prioritised
- [ ] Requirements needed are clearly documented
- [ ] Requirements validated and signed off by stakeholders

Integrations

- [ ] Decided on which integrations are needed

Prepare Data

- [ ] Data sources identified
- [ ] Data quality analysed
- [ ] Data cleansed & mapped
- [ ] Data ownership determined

Manage Change

- [ ] Communication plan compiled
- [ ] Training plan compiled
- [ ] Identify areas at risk of change resistance
- [ ] Measure success

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.

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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.

Ready to start your Salesforce implementation?

Xenogenix's Salesforce implementation services help you set up a Salesforce that's tailored to your business and aligned to your business processes, at a fraction of the cost of an in-house implementation.

Go to our website or give us a call today to speak to a consultant about the options available for you.

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