4 STEPS TO GET BUY-IN FROM YOUR USERS

Maximize your team's efficiency and engagement with these proven adoption strategies.

1. Standardized User Onboarding Process

- [ ] **AUTOMATE ONBOARDING WITH USER ACCESS POLICIES**

  Define and document a repeatable onboarding workflow, leverage Salesforce's user access policies found in Setup. These processes can allow user setup to be seamless automatic and consistent.

- [ ] **USE PERMISSION SET GROUPS TO ASSIGN ROLE-BASED ACCESS**

  Best practice for user permissions is to setup permission set groups that hold the relevant permissions for roles within your organization, this can help simplify user setup while ensuring permissions are consistent across the entire team.

- [ ] **USE CLEAR, MINIMAL PROFILES**

  In addition to simplifying user management, minimal profiles help to enhance security, and reduce confusion. Clean, standardized profiles ensure users only see what they need — leading to better user experience, stronger data integrity, and easier admin maintenance.

- [ ] **PROVIDE GUIDED TRAINING FOR FIRST-TIME LOGINS**

  Short demo videos or documentation can help first-time users quickly understand key features and workflows, reducing frustration and boosting early confidence.

- [ ] **RECORD SHORT WALKTRHOUGHS FOR KEY PROCESSES**

  Short video walkthroughs (ideally ~ 5 min) can help to explain and provide clarity on processes with backed visual support to allow users to have confidence in steps needed to complete processes throughout the system.

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2. Optimize the Click Path

- [ ] **USE LIGHTNING RECORD PAGES TO HIGHLIGHT CRITICAL FIELDS**

  Reduce field clutter — keep forms clean. Prioritize and organize layouts to keep the most relevant fields readily available and easy to use.

- [ ] **ENSURE BUTTONS AND LABELS ARE INTUITIVE AND RELEVANT**

  Provide clear name for buttons, and ensure that the screens/steps are intuitively designed with process driven navigation

- [ ] **USE SCREEN FLOWS TO GUIDE USERS THROUGH MULTI-STEP PROCESSES**

  Leverage screen flows to build processes that guide your user through a series of steps where they can manage records and data.

- [ ] **AUDIT USER JOURNEYS: LIMIT CLICK DEPTH FOR KEY TASKS**

  Regularly survey your team and/or shadow team members to ensure their most frequent/important tasks have minimal click depth.

- [ ] **UTILIZE QUICK ACTIONS FOR REPETITIVE USER TASKS**

  Create quick actions (which can be easily accessed via a button) to provide easy direct access to repetitive tasks.

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3. Make Analytics Unavoidable (and Useful)

☐ **PLACE YOUR KPIS FRONT AND CENTER WITH A CUSTOM HOME PAGE**

Creating a customized home page helps your users start their day with the most important metrics in mind, consider adding dashboards that highlight neglected or stalled items.

☐ **USE DYNAMIC REPORTS/DASHBOARDS WITH USER-BASED FILTERING**

Having reports use pre-built filters like “$User” (which tells salesforce to use the current user as the reference point) can help make analytics always relevant.

☐ **SETUP AUTOMATED REPORT SUBSCRIPTIONS**

Using report subscriptions can help to keep key persons aware of the metrics most important to them. This also can help with creating regular check-ins on KPIs.

☐ **ENSURE EVERY ROLE KNOWS WHICH METRICS THEY “OWN”**

Providing documentation to help your team understand which metrics are within the expectations of their role can help users trust their actions have meaning and purpose.

☐ **TRACK USAGE WITH THE LIGHTNING USAGE APP**

Take the guess work out of adoption rates, leverage these pre-built reports to help gain insights into how well (or poorly) your team is using the system.

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4. Reinforce with Feedback & Support

- [ ] **HOLD WEEKLY/BIWEEKLY OFFICE HOURS FOR Q&A**
  Provide your users with the ability to share their experiences via Office Hour style syncs consider breaking these into by department if user base is large.

- [ ] **IMPLEMENT A TICKET LOGGER FOR FEEDBACK AND FIXES**
  Allowing users to log their feedback any time and with a simple form can help to ensure users don't lose their thought or requests when they occur.

- [ ] **DESIGNATE INTERNAL "CHAMPIONS" BY DEPARTMENT**
  These "champions" can be a way to help users feel more comfortable and/or willing to share feedback. Be sure to offer this opportunity opposed to blindly assigning.

- [ ] **CREATE A RELEASE/DEPLOYMENT COMMUNICATION PLAN**
  This can be a living document stored on your internal content management tool or knowledge base. Be sure to update it regularly and share the updates with your users.

- [ ] **UPDATE TRAINING MATERIALS REGULARLY**
  Make it an intentional part of your update process to update training materials. Remember this may include re-recording video demos to help demonstrate processes, in addition to documentation updates.