

15 Steps to Successful Salesforce Implementation:



- 1. Document your current sales, marketing, and customer service systems before implementing Salesforce.** If your process is not documented, reviewed, and approved by the business, you will not get the most out of your Salesforce roll-out.
- 2. Analyze your company's sales, marketing, and customer service processes with special attention placed on customer pain points.** After a thorough understanding of this, create a list of improvement areas for prioritization based on value to the organization.
- 3. Review the list of improvements and determine what to automate.** The goal will be to pick the improvement areas that will increase sales, expand collaboration, enhance customer service and drive efficiencies in your overall processes. Look for ways to automate areas that will save time for your users, which is the key to gaining value from Salesforce.com.
- 4. Define project goals that are specific and measurable.** Determine in-scope requirements, a project team, estimates, a change management plan, and set a target completion date.
- 5. Establish benchmarks** for business performance, technical performance, entry & exit criteria for development phases and customer satisfaction metrics.
- 6. Define business sponsor(s) from each business unit who can represent their individual business unit.** This person will be responsible for defining & approving requirements, providing feedback on demos, participation in user acceptance testing, and providing business approval at go-live. This person will be your in-house user support person for hyper-care after go-live.
- 7. Get executive support.** If senior executives do not believe in the importance of the implementation, the project is in serious danger.
- 8. Build a project team committed to achieving the goals.** This should include everyone who will use the system including: project managers, business analysts, developers, quality assurance, user acceptance testers and business leaders. The team should manage the implementation and remain active after the rollout.
- 9. In selecting Salesforce features, involve all people who will use the new features to assure their acceptance, especially the sales and marketing staff.** One major reason for CRM failure is sales staff resistance. Sales teams should understand the benefits of overall sales efficiency. Release notes with changes and how Salesforce will create more selling opportunities is critical for a successful roll-out.

- 10. Define a Subject Matter Expert.** It is important that you define a business SME (subject matter expert) who understands the business process and the needs of the individuals of who will be using the system. This person will be your in-house support person for the development and QA teams to go to for immediate feedback critical questions.
- 11. Implement Salesforce so users can work more efficiently and as a team.** Determine how outside sales works with, and shares, information with marketing and customer support. Use the system to bridge the gap between sales and customer service support with clear reporting for the executive team to make better decisions.
- 12. Use a phased approach; don't rush to do everything at once.** Concentrate on your main objectives first, let one success lead to others. For example, get the in-house system up and running smoothly before adding the outside reps.
- 13. Use a certified Salesforce consultant to assist your internal team.** We recommend the use of a capability matrix to understand where to add a Salesforce consultant to fill the gaps of your internal team. Experience really does matter to ensure a successful implementation.
- 14. Build a strong change management plan to ensure that users are aware of impacts that may affect them.** We suggest using system demos, release notes, seminars, technical publications, and executive communications. Building a strong change management plan to help the end user journey should not be overlooked.
- 15. Allocate enough time for training of your end users.** We recommend a variety of training methods such as live in-person training, recorded videos, and online WebEx training. This is a critical area that we see many organizations miss. Poor results from inadequate training will cost more than money spent on training with failed user adoption, lost productivity, and misuse of the functionality.



KEY POINTS TO TAKE AWAY:

- A successful implementation will equally benefit your Salesforce users and customer interactions.
- Simple is better. Roll-out new features at a pace your users can understand.
- Top management support is vital! Senior managers must lead by example and help users understand the benefits of your CRM roll-out.
- Build the right project team to be successful!
- Training and change management is critical. Do not overlook this!



For more information on these recommendation or any other questions you have based on your unique business please contact us at info@cirriussolutions.com or on the web at www.cirriussolutions.com/contact.