5 steps to a successful implementation

No matter how big or small your company—or the Salesforce CRM project—success requires planning, commitment, and strong sponsorship from your company's executive team. It's also critical that you understand the needs of your managers and users before getting started. Without a detailed understanding of these needs, it's easy to go overboard in customizing the application just because it's so easy.

Abstract

Whether you're just starting out or are in the middle of an implementation, this document can help guide you to success.

By Allison Lewinson

For detailed information about implementing Salesforce CRM, go to the Getting Started section on the Community pages. You'll find information about individual implementation topics, as well as a Getting Started Guide (scroll down) that pulls all the information together and includes a link to a workbook you can use.

Here are the 5 steps to a successful implementation:

1. Plan and prepare
2. Set up and customize
3. Deploy Salesforce CRM
4. Drive adoption
5. Continuously improve

Step 1: Plan and Prepare

Your first step is to plan and prepare. In this step, you'll identify your company's vision, goals, and metrics as well as your resources, tools, and dependencies. Getting this step right is crucial, so you won't waste time or have to back track.

Organize your team

The size and scope of your rollout will determine how many resources you need. However, all project teams should include the following participants:

- **An executive sponsor** – The project's executive champion should participate and support the initiative from the beginning, through go-live and beyond.
- **One or more system administrators** – This person should be involved throughout the implementation and afterward. It's important that the administrator understand the business processes and requirements from managers and users. For information about how to plan administrator resources, see the Best Practice document "Achieving outstanding CRM administration."
- **A project manager** – This person leads the implementation and makes sure the project tasks and overall timeline are on track.
- **One or more power users** – These users help make sure your project will meet the needs of the end users, including management. We also recommend that you use power users as first-line support. To fill that role, consider training these users first and then providing more in-depth training.

Best practice

- **One or more trainers** – Trainers need to identify relevant materials from salesforce.com or develop custom training materials (such as quick-reference guides). You'll need materials both for the initial implementation to on-board new users and once the application is live, for remediation or for new functionality

Set realistic goals

Your Salesforce CRM implementation will be an ongoing, living process. To get the most from your investment, it's important to roll out functionality early and often. Start with small goals that track against your overall vision. We recommend that you "crawl, walk, run" by keeping your goals simple and attainable and then adding to your achievements.

- Define how Salesforce CRM fits into your overall corporate mission. For example, you may want to focus on collaboration or pipeline management and forecasting.
- Define initial objectives that align with your vision and can be expanded once you deploy.
- Prioritize and document your requirements. Gather requirements from your business and end users and map them to the objectives and overall vision. For example, your users may want to "track tasks and events," so make sure that functionality will be available.

Understand your data

Whether you're moving from another CRM application or simply tracking customer information in applications such as Lotus Notes and spreadsheets, you'll already have existing data. Data always becomes a bottleneck if it's not reviewed and cleaned early in a project.

Most customers underestimate the effort it takes to clean up, map, and load data. Data shouldn't be loaded until your system is set up, including setting up your role hierarchy, sharing model, and sharing rules.

By taking the time to understand your data during the planning stage, you can help define critical questions such as "Are we tracking crucial data?" and "What else should we be tracking?" For more information about the importance of data quality, see the Best Practice "6 steps toward top data quality."

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Choose an implementation approach

The two most widely used approaches are the "waterfall" and "scrum" methodologies. Waterfall is the traditional, phased, sequential approach that may lead to a drawn-out implementation timeline. The scrum approach is to constantly build and deliver small units of functionality and revisit and refine them with each cycle.

Salesforce.com uses the more iterative scrum approach for its development. With our regular releases (spring, summer, winter) we deliver new enhancements as soon as we have a baseline of functionality and then build and refine the functionality based on user feedback and use cases. For example, our quoting module was first delivered as a pilot with limited functionality. We added additional functionality in the next release as a beta release. In the next release, we added even more features and made it generally available. We'll continue to add additional features as customers use quoting and let us know what they want.

Decide which approach suites your business. Many enterprise customers start with the waterfall approach for the initial release and then start using a more agile approach, scheduling regular major (for example, quarterly) and minor (for example, monthly or bi-monthly) releases.

Build a project timeline

Once you've chosen an implementation approach and prioritized all requirements, you can build the project timeline. Every timeline needs to include the time required to design, build, and deploy. Prioritization of requirements is also key to ensure any "must-haves" are included in the first phase or rollout.

If you use a scrum approach, your timeline will consist of short iterations of the design, build, and deployment phases for a smaller set of requirements. With the waterfall approach, the design and build phase includes all requirements prioritized for the initial deployment. For both approaches, consider what tasks can be done in parallel, such as cleaning, mapping, and loading data.

For both approaches, consider each requirement and estimate the effort required to implement it. For example, determine whether you can meet the requirement with out-of-the-box functionality or business processes (low effort) or whether custom development or integration is required (high effort). Use that information to determine how long it will take to implement each requirement.

Note that your timeline may be driven by additional factors, such as when your current system may become unavailable or a new fiscal year. Such considerations are a big reason why it's important to understand your goals, objectives, and must-have requirements.

Step 2: Set up and customize Salesforce CRM

Once you define your requirements, understand your data, and choose an implementation method, you're ready to set up and customize Salesforce CRM. We recommend you keep the initial implementation simple and use the "click-not-code" built-in configuration tools, rather than using Force.com code (Apex) and the pages functionality of the Force.com platform. As you get experience with the application and feedback from your users, consider how to enhance the application with those tools.

Define early how to customize the application. For example, if you need multiple record types for an object and field-level security, identifying that need helps as you create new custom fields and associate them to the correct record type, page layout, and security level in the wizard.

Be careful not to over-configure. For example, one customer created many new fields on its contacts page, which meant users had to scroll—a lot. As a result, they didn't fill out many fields and the company had start over with designing that page.

Here's a suggested approach for setting up and customizing Salesforce CRM:

- **Define the security settings –** Include the organization wide-defaults, roles, and user profiles. Test those settings by logging in with different roles and profiles. Make sure each user type can see, create, and edit information as needed, that the fields are in the right order, and that critical fields are required. Another important step is mapping all the roles to the users who will be added to the system, to ensure all users are associated with the correct roles when you go live.
- **Customize the application** – Create custom fields, page layouts, custom objects, custom tabs, rules, and other application customizations based on the design for each requirement to meet the business needs.
- **Create your reports –** We recommend that you start with the standard reports and customize them as needed to show the information you defined in the planning stage. You can easily customize reports to include any custom fields you need.

Step 3: Deploy Salesforce CRM

The timeline you defined in the planning stage should define the deployment phases and associated schedule. At the first stage, your task is to get your instance of Salesforce CRM “production ready” by creating and adding users, loading your data, and training users.

It’s important to communicate early and often, so users know about coming changes. Communication should come from the executive sponsor and focus on both the benefits to the company and what’s in it for the users. Build excitement and set expectations. As the deployment draws nearer, outline the deployment plan, including when users will be trained and how they’ll be supported.

Add users

Before loading your production data, first load all users. You can load users manually, one at a time, or with the data loader functionality. We recommend you first load all users and data in a sandbox environment before loading the final set of data into your production environment. (Unlimited Edition includes sandboxes; for all other editions, you can purchase sandboxes for an additional fee. Please contact your account executive for more information.)

If you load users with the data loader, the password notification is not automatically sent out. That’s good, because you don’t want to send out passwords until users have been trained and you’re ready for them to log in. If you add users manually, you can select whether the user is notified.

Import data

Because data is loaded at a specific time, the transition will be easier if the data load is as close to deployment as possible. Be sure you schedule enough time to map and test the data. Here’s a summary of the steps involved in importing data:

1. Plan your data import
2. Prepare your data
3. Test the import
4. Execute the import
5. Validate your data

Note: If users are still entering data into an existing system after the initial data load but before the go-live or cutover, there may be a set up “delta” data set. You’ll need to import or manually load that data and incorporate it into any training exercises.

Train end users

If you have a sandbox environment, you can train end users around the same time you load your data. Use a subset of data—or data developed specifically for training—and plan training with hands-on exercises as close as possible to the go-live date. The sooner users can begin to use the application, the better; that way they can get immediate help in response to any questions.

Once users are trained and using the app, make sure they understand the support process. Define a contact for answering questions. And don’t forget about the power users. What if they can’t see their data? Schedule regular support sessions for the first week or two; that’s when you’ll get the most questions. Also, post links to training, job aids, quick reference guides, and where to get help—for example, on your home page.

Salesforce.com provides free online free training for end users. Also check out the following Best Practice documents: “10 tips for a successful training plan” and “How to develop a comprehensive training strategy.”

Step 4: Encourage adoption

Once you're up and running, it's critical to get your users on board. To do so, it's important that you support your users, measure adoption, and encourage adoption.

User adoption begins with executive sponsorship. For the initial deployment, the sponsor must communicate clear expectations as well as enthusiasm. Usually, a combination of "carrots" and "sticks" works well, such as a mandate that "If it's not in Salesforce CRM, it doesn't exist." Use exception reports and dashboards to track usage and then use that information to understand where you need encouragement or enforcement.

Measuring adoption is critical, both immediately after go-live and over time. Set up usage reports and use adoption dashboards to track progress right from the start. You'll find adoption dashboards on the AppExchange. Use these dashboards to track login activity and new records added by users—both are a good start in ensuring users are logging in and beginning to use the application.

Also, check out Chapter 5 in the *Getting Started Guide* and the following Best Practice documents: "Beyond login rates; Three key areas for measuring adoption" and "Tips for using incentives and awards to boost adoption."

Step 5: Manage releases

Once Salesforce CRM is live, a new cycle of planning begins for the next phase, as you make available new functionality to add value and respond to user requests. Release management should begin as soon as possible after the initial deployment. This approach will also let end users know that you're addressing their needs and requests. For more information, refer to the *Release Management Best Practices Guide*.

Summary

Although Salesforce CRM is easy to get up and running, proper planning and preparation is essential for a successful implementation. Start by securing executive sponsorship so you have support when building your project team and communicating with the end users. Set up and customize the application so it works for your company's unique needs. And continually revisit and optimize the application, build and refine your metrics, and always keep your end users and overall vision in mind.

To support you in this process before, during, and after your implementation, salesforce.com makes a number of resources available. In addition to the *Getting Started Guide* and associated workbook, we suggest you explore the following:

- CRM Community, where you can participate in the conversation
- Blogs and discussion forums
- User groups near you
- Current Webinars, to get information right from the experts
- Ideas functionality, to suggest new products, promote favorite enhancements, interact with product managers and customers, and preview upcoming releases

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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