Getting Started Implementation Guide

Table of Contents

Step 1: Prepare

One of the best investments you can make in your Salesforce CRM success is to have a clear plan. Just as you wouldn't build a house without a blueprint, you don't want to start using Salesforce CRM without a plan. A plan will help you to communicate with everyone, to do things in the right order, identify key resources, and keep a clear end date in mind.

As you plan and prepare to get Salesforce CRM up and running, complete the following steps:

- Build your team
- Define your company's vision
- Define and prioritize your goals
- Develop your rollout plan
- Define key aspects of your process and diagram the process flow
- Map your process to Salesforce CRM functionality
- Decide which reports you need
- Train your administrator
- Communicate with your end users

To help jumpstart your implementation, you can use the worksheets in the [Getting Started Workbook](#) to develop plans and document your decisions. Download the workbook and treat it as a work in progress that you return to frequently as you complete the steps in this guide.

Build Your Team

To a small business with limited resources, the term "project team" may sound intimidating, but it doesn't take a huge team to implement Salesforce CRM. You just need to cover the following key roles (and the same person can cover more than one role):

- An executive sponsor
- A project owner to get the application up and running
- An administrator to manage Salesforce CRM day to day
- A power user who really knows your company's business processes

The **executive sponsor** lends his or her influence to the project by becoming its champion. Having that person's full support and participation—from the planning stage until the go-live date and beyond—is absolutely critical.

The **project owner**, who leads the implementation project, must understand the organization's business processes to map them to Salesforce CRM.

The person is designated as the **system administrator** manages Salesforce CRM day to day and makes new functionality available. It's also a good idea to have the administrator involved in the implementation. A technical background is not necessary, but may be helpful.

And to make sure that Salesforce CRM meets the needs of your end users, it is essential to involve key **power users** in the planning process.

Find the Right Salesforce CRM Administrator

Software as a service (SaaS) makes system administration much easier that it was with traditional software. Setting up the application, customizing and maintaining it, training users, and "turning on" the new features that become available with each release are all just a few clicks away.

The system administrator is one of the most important people when it comes to making your Salesforce CRM implementation a success. The role of the administrator for a small business is not necessarily a full-time position. In the initial stages of the implementation, the role will require more concentrated time (about 50%). After go-live, managing Salesforce CRM day to day will require much less time (10–25%).

Find the right person for the job and continue to invest in that person's professional development. Here are some qualities to look for in an administrator:

- A solid understanding of your business processes
- Knowledge of the organizational structure and culture to help build relationships with key groups
- Excellent communication, motivational, and presentation skills
- The desire to be the voice of the user in communicating with management
- Analytical skills to respond to requested changes and identify customizations

You may also want to take advantage of Premier Success & Administration to assist with key tactical responsibilities. Through this service, our experts can help your team with administrative tasks and serve as an extension of your internal team.

Identify Your Key Players

It's time to pick your team. Go to the Getting Started Workbook and fill in the My Project Team worksheet to track the people who will play key roles in your Salesforce CRM implementation.

Define Your Vision

Every successful CRM project starts with a clear vision of where you want to be as a result of the project. Your vision will define a clear purpose for the initiative, drive ongoing commitment, and provide a way to measure and prove results.

It's very important that your key executives are involved in defining this vision, that you document the vision, and that it is understood by everyone.

➢ *Action*: Go to the Getting Started Workbook to review sample vision statements and then fill in the My Vision Statement worksheet. This vision should be a key component of future communication with your users.

Define and Prioritize Your Goals

In addition to a clear destination, it also helps to have a plan that breaks down the journey into manageable steps. Setting your goals involves two key steps:

- Define the goals that support this vision

- Prioritize and document your requirements

Define Your Goals

Determine which concrete goals support your vision. Keep in mind that different groups within your organization are likely to have different goals. For example:

- Executives want to improve sales and track top performers or customer issues.
- Sales managers want better visibility into their pipelines and reports that summarize key information.
- Sales reps want to easily access the sales materials they need and cut down on administrative work.

Salesforce CRM provides various reports to help measure whether you've reached your goals.

➢ ***Action***: Go to the [Getting Started Workbook](#) and complete the My Pain Points and My Business Goals worksheet.

Prioritize Your Goals

Most people, and most organizations, want to take on more than they can handle at any one time. Clearly defining your goals and then prioritizing them will make it easier to decide what to put off, should that become necessary. Having some early "wins" is essential. When people experience the value of Salesforce CRM first hand, they're more likely to support adding additional features.

➢ ***Action***: Go to the [Getting Started Workbook](#) and complete the My Business Priorities worksheet.

Develop Your Rollout Plan

Customers typically take the approach of walking before they run. They focus first on a subset of the functionality available in Salesforce CRM—allowing users to get comfortable with the application and adopt the most critical features—and then add more functionality during later phases.

It's important to build your plan around the key areas you want to introduce first, then build your roadmap on the additional areas you will expand later.

Here's an example of how one customer decided to approach their deployment, broken into three phases:

Phase 1:
Import accounts and existing pipeline for general account and opportunity management
Introduce a Chatter group for Salesforce CRM training and project communication

Phase 2:
Upload existing leads and begin tracking leads from various sources
Introduce campaign management to track marketing initiatives
Launch competitive intelligence Chatter groups

Phase 3:
Begin tracking customer issues by onboarding the customer service team and using cases
Launch forecasting to the sales team

> ➢ **Action**: Go to the [Getting Started Workbook](#) to view examples of rollout strategies and build your own plan for approaching your deployment.

Define Key Aspects of Your Process and Diagram the Process Flow

When defining your process, it helps to follow these steps:

- Make sure you understand key Salesforce CRM terminology
- Identify key characteristics of your business processes
- Define and develop a visual overview of your own process
- Clarify what happens at each step—what inputs are needed, who does what, and how to measure the results
- Map your business processes to Salesforce CRM

> ➢ **Action**: Go to the [Getting Started Workbook](#) to help you define and diagram your process, using worksheets that help you identify key aspects of your business processes and document all the fields you'll need.

Understand Key Salesforce CRM Terminology

- **Leads** – A lead is any person that may be interested in your products or services; for example, someone you met at a conference or who filled out a form on your website is a lead. If a rep qualifies a lead and decides to pursue it, the lead is "converted," which automatically transforms it into three objects: an account, a contact, and an opportunity.

- **Accounts** – An account is an organization, individual, or company that you want to track in Salesforce CRM. An account can include customers, competitors, partners, or any other entities that make sense for your business. An account record contains—or connects to—all information about your interactions with the company, such as in-progress and completed opportunities, your points of contact, and records of past interactions.

- **Contacts** – The contact object stores information about people who work at the companies represented by the account object. A contact record contains all relevant information about the person, such as phone numbers, titles, and role in a deal, and much more. With contacts, you can capture all the personal information you need to develop the relationships that are so important in sales.

    When a sales rep converts a lead, the information in the lead is automatically transferred to the contact. As your engagement with the company widens and your reps meet more people, they can keep creating additional contacts associated with the corresponding account.

- **Opportunities** – The opportunity object contains the information for every deal you're tracking, such as deal size and expected close date. The opportunity object is at the core of your sales process. By adding an opportunity, you build a "pipeline" you can use for forecasting.

- **Activities** – Activities consist of the tasks, events, calls, and emails that make it possible to track every customer interaction.
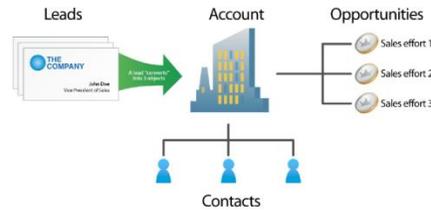
You can see the [full glossary](#) in the Help & Training portal.

Outline the Key Aspects of Your Sales Process

For most businesses, outlining their basic sales process includes gathering the following information:

- Generating leads – Where do leads come from? How do they get into Salesforce CRM? What happens next? What information do you want to measure about leads?
- Optimizing lead flow – How do you manage open leads? How do you check for duplicates? How do you work through leads? How do you measure conversion and top performers?
- Closing deals – How do you manage the sales funnel? How can you measure top deals, closed business by month, and month-to-date trending?

Create Your Process Overview

The goal of this step is to come up with a visual overview of your processes. Here's an example of a sales process:
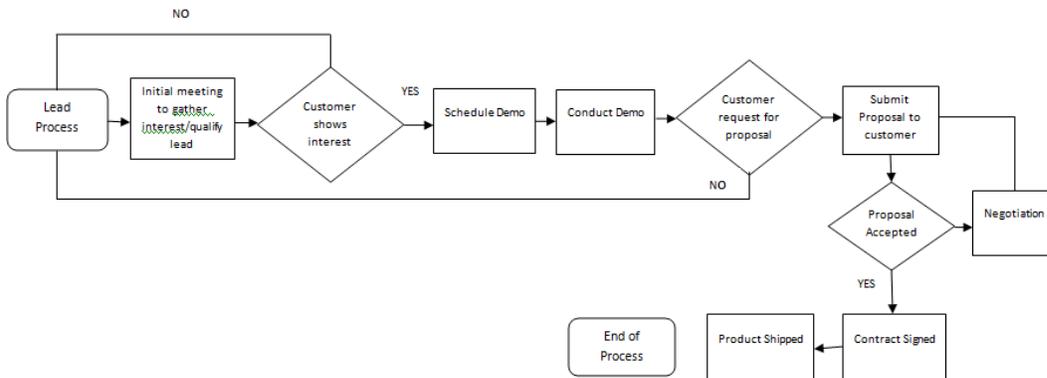
Discuss the sample process with your project team and modify it to fit your organization. If you don't have a defined sales process, a CRM implementation is a good time to set one up.

To set up your own sales process:

- Start at the point where a lead is qualified as an opportunity.
- On a whiteboard, draw each step as you ideally want the information to flow.

- ➢ **Action**: Go to the Getting Started Workbook and complete the My Business Process Questionnaire and the My Business Process Diagram.

Map Your Process to Salesforce CRM Functionality

The next step is to map your ideal process to Salesforce CRM and establish the names you give to your data elements and the fields in Salesforce CRM. For example, you may call a customer "Company," while the corresponding field in Salesforce CRM is "Account."

To start the mapping process, review the fields associated with the Opportunity process—which includes the fields for Leads, Accounts, Contacts, and Opportunities—and answer the following questions:

- Do you need all the fields? Review the fields and decide which can be removed.
- Do you need to rename standard fields so they make more sense; for example, change "Account" to "Company"?
- Do you need custom fields that are unique to your business?

- ➢ **Action**: Go to the Getting Started Workbook and review the worksheets related to the Leads, Accounts, Contacts, and Opportunities fields. Use them to track the mapping of fields.

Decide Which Reports You Need

Decide which reports you need to generate based on the goals you defined earlier. Salesforce CRM provides dozens of standard reports. Here are a few of the most commonly used reports:

- Active Accounts – Shows current accounts
- Account Owners – See who owns what accounts
- Lead Lifetime – Track the life of a lead from creation to closure
- Leads by Source – Find out the most and least effective lead sources
- Opportunity Pipeline – See upcoming opportunities, in current stage
- Stuck Opportunities – See which opportunities are not moving forward
- Closed Opportunities – Shows won opportunities
- Quarterly Forecast Summary – Show commit amounts, best-case amounts, and pipeline by quarter
- Contact Role – Shows contacts involved in current deals

For a list of additional reports, navigate to the Reports tab in Salesforce CRM; on the left side, you will see a list of report folders organized by function (Sales Reports, Opportunity Reports, etc.). Click into the folder to view these standard reports. You can modify these reports or create your own from scratch. Thinking about what information you want to capture is a critical step

before you begin customizing the application. Remember: The system is only as good as the information you can pull into a report.

- ➢ *Action*: Go to the [Getting Started Workbook](#) and revisit your goals, then complete the Reports that Match My Business Goals worksheet. Determine whether the standard reports are sufficient or whether you need to build custom reports.

Train Your Administrator

Investing in your administrator is the best way to ensure success. Salesforce CRM offers both virtual self-paced training and [classroom training](#). The self-paced training classes are available with your licenses around the clock at no additional charge. We offer a popular basic course called "Getting Started: Administering Salesforce".   We also offer comprehensive instructor led training courses regionally and virtually at an additional cost.

During the implementation, you may want to consider getting help from our large network of certified consulting partners. They can assist with all aspects of the implementation, and many customers find it useful to leverage partners' expertise and technical skills.

Visit our [AppExchange](#) or engage with your account executive for more details.

Communicate with Your End Users

With clear goals set, you can now engage your users. User adoption is critical for Salesforce CRM success.

You don't want the introduction of Salesforce CRM to come as a surprise to users. Instead, start building enthusiasm and keep your users updated as your go-live date approaches. For the highest impact, these communications should come from the executive sponsor. Here are some approaches that have worked for other customers:

- Build anticipation by enlisting the help of your marketing staff in treating the Salesforce CRM implementation like a product launch.
- Focus on two or three aspects of Salesforce CRM that will make your users' lives easier.
- Reach out to users who seem particularly enthusiastic and give them a role in helping other users once you're "live."
- Sponsor contests and offer incentives to help build excitement.

One of the best ways to get people on board is to get them involved. Give them a voice and be sure to make changes based on their feedback. Then, communicate the difference their input made on the project's launch.

- ➢ **Recommendation**: Create a Chatter group to share information about your Salesforce CRM deployment. You can consolidate all materials, training resources, and conversation into one central location. You can also share key milestones and achievements related to your Salesforce CRM deployment. Make sure that your executive sponsor is engaged and posting updates and feedback to your users.

Summary and Checklist: Prepare

Careful preparation and planning will help make the remaining steps in implementing Salesforce CRM go smoothly.

At this point, you have learned about the following tasks and documented any important decisions you made in the Getting Started Workbook:

Task	Completed
Identify project team	
Define your vision	
Define your business goals and objectives	
Define your rollout plan	
Create a diagram of your main processes	
Map your processes to Salesforce CRM	
Define your reporting needs	
Train your administrator	
Notify and engage end users	

Step 2: Set Up Salesforce CRM

This section tells you how to take the next steps by outlining the key areas to begin setting up Salesforce CRM, including:

- Company profile
- User access and permissions
- Customization
- Adding users
- Importing data

Set Up Your Company Profile

The company profile information determines basic settings related to time zones, language, and how the fiscal year is defined. You can leave the default settings as is; however, it's important to know where to find and change this information.

- Company profile – These settings use your local time for setting the time zone, default language, and the default currency.
- Fiscal years – The fiscal year definitions are used in reporting, opportunities, and forecasting. The default fiscal year setting is a 12-month calendar year, with the first day of the fiscal year starting on any first day of the month. However, you can choose custom fiscal year periods.

To make changes to your company profile, go to:
- o Setup → Administration Setup → Company Profile → Company Information

➢ ***Resource***: For step-by-step instructions, see the [Set Up and Maintain Your Salesforce Organization > Set Up Your Organization](#) portion of our User Guide.

Establish User Access and Permissions

There are some key components that determine users' access to data as well as what they can do with the data they have access to.

Data Access

When setting up Salesforce CRM for the first time, you need to make some decisions about who will have access to what data. In Salesforce CRM, there are four ways to control data access:

- **Organization-wide defaults** – Configure the baseline access users will have to your data.
- **Role hierarchy** – Determine the level of visibility users have to data.
- **Sharing rules** – Extend access to data if you've restricted access through your organization-wide defaults.
- **Manual sharing** – Provide the flexibility to allow record owners to manually give access to other users.

Organization-Wide Defaults

These settings, which determine the default level of data access for different types of information, are referred to as "organization wide defaults." These include:

- Private – Users can access (view and edit) their information and that of those below them in the role hierarchy.
- Public Read Only – Users can view all data, but can edit only their information as well as that of those below them in the role hierarchy
- Public Read Write – Users can view and edit all data

For smaller organizations, we recommend granting at least Public Read Only access to create a collaborative working environment.

Examples:

- To allow all users to see everyone's accounts, but not everyone's opportunities, set access for account records to Public Read Only and for opportunity records to Private.
- To allow the operations team to calculate commissions, they need to see opportunities. However, you don't want them to edit the opportunities. To allow read-only access, set opportunity records to Public Read Only.
- To set up organization-wide-defaults, go to Setup → Administration Setup → Security Controls → Sharing Settings.

> ➤ *Resources*:
>   > ➤ *For an overview of user access and permissions, view our [Getting Started Series: Setup](#).*
>   > ➤ *For a deep dive, view our [Who Sees What video series](#).*

Role Hierarchy

The role hierarchy looks similar to an organization chart, but it has a different purpose. Because the role hierarchy is based on who needs to work with what data to do his or her job, role hierarchies usually have fewer layers and the people at the top are not necessarily those at the top of the org chart.

The person in the top role has full access (view and edit) to his or her data as well as the data of anyone lower in the hierarchy. Two common ways to set up role hierarchy are by region or by product.

Note that if there is a conflict, the role hierarchy overrides the settings in the organization-wide-defaults.

There are three basic steps to setting up a successful role hierarchy:

1. Define the basic roles, such as sales representative, director of sales, and CEO. It's not necessary to create individual roles for each title; the idea is to simply define a hierarchy that gives users in higher-level roles access to the information entered by users in the lower-level roles.
2. Build the role hierarchy based on how information should roll up for reporting and on who should see what data.
3. Assign individual users to the roles.

> ➤ *Resources:*
>   > ➤ *For an overview of user access and permissions, view our [Getting Started Series: Setup](#).*
>   > ➤ *For a deep dive, view our [Who Sees What video series](#).*

Sharing Rules

Sharing rules let you make automated exceptions to your organization-wide defaults for particular sets of users, so you can give them access to records they don't own or can't normally see. Sharing rules, like role hierarchies, are only used to give additional users access to records—they cannot be stricter than your organization-wide default settings.

> ➤ *Resources:*
>   > ➤ *For an overview of user access and permissions, view our [Getting Started Series: Setup](#).*
>   > ➤ *For a deep dive, view our [Who Sees What video series](#).*

Manual Sharing

Sometimes it's impossible to define a consistent group of users who need access to a particular set of records. In those situations, record owners can use manual sharing to give read and edit permissions to users who would not normally have access to the record. Although manual sharing isn't automated like sharing rules, it gives record owners the flexibility to share particular records with users that need to see them.

Permissions

Profiles control what users have permission to do with the data they have access to, and how they view the information.

> ➤ *Resources*:
>   > ➤ *For an overview of user access and permissions, view our [Getting Started Series: Setup](#).*
>   > ➤ *For a deep dive, view our [Who Sees What video series](#).*

Understand Profiles

A profile is a collection of settings and permissions that defines how users with particular profile access records, how they see their data, and what they can do within the application. For Salesforce CRM Group and Professional Editions, you can use the standard Salesforce CRM profiles but you can't create custom profiles. Even so, it's important to understand profiles and how they work together with the organization-wide defaults and the role hierarchy. The most important profiles include:

- System Administrator – Can configure and customize the application
- Standard User – Can run reports and create and edit records
- Read Only – Can run and export reports and view—but not edit—records

When you add users as you prepare to go live, you will assign one of these profiles to each user.

Customization

When you sign on with Salesforce CRM, it's ready to use as is. But you can also easily modify Salesforce CRM so that it's an even better fit for your business and your users. In fact, the more you customize the application to fit your specific users, the more comfortable they're likely to be—and customization can do great things to boost your adoption rates.

In this section, you'll learn about customization and get links to step-by-step procedures for making Salesforce CRM your own.

- Customization tips & tricks
- What can you customize
- Whether to use the lead functionality
- Capturing leads from your website

Use Customization Tips & Tricks

Customizing Salesforce CRM is so easy that there's a tendency to create lots of fields that end up not being used. For that reason, it's important to take a step back before you dive in.

Here are the top five things to think about before starting to customize:

- **Think before you build** – Start with the end in mind by identifying your end goal. Think about what information you want to pull out of the system, and then make sure you have the fields to match. At the end of the day, Salesforce CRM is only as good as what's in your reports.
- **Ask for input** – Talk to your users to find out what's critical for them to know. Then capture that information to run your business.
- **Seed and grow** – Start with the basic fields you need and then identify new fields that could make your business run even better. This approach ensures you don't turn off your users.
- **Run reports** – Run reports about one month after you go live to find out which fields are not being used. Use the opportunity to survey users about what could be improved.

  > ➢ **Tip**: Look at the [AppExchange](#) for data quality dashboards and insight into data quality and record completeness.

- **Make changes on the fly** – In response to feedback, make changes immediately to gain instant credibility. Make sure you communicate any changes, because users don't like it when anything that affects their work happens "magically."

Know What Can You Customize

You can customize many different Salesforce CRM components; however, most customers customize three things:

- Fields
- Page layouts
- Reports

Customize Fields

Because fields hold the data you want to capture and report on, it's important to make sure you have fields for important data elements and that those fields have names that make sense to your users. Here are common approaches to customizing fields:

- Modify the standard Salesforce CRM fields – Salesforce CRM provides commonly used fields for standard records such as accounts, contacts, opportunities, and leads.
  - For example, the Lead object has a standard field called "Rating," which has existing values of "Cold," "Warm," and "Hot." You can easily add a new value called "Lukewarm."
- Create fields from scratch – If a standard Salesforce CRM field that you need doesn't already exist, you can easily create a custom field. For example, you can add a new picklist to capture "Competitor" and track the main competitor in the sales cycle.
- Do both! Combine standard fields and custom fields to create the best experience for your users.

Customize Page Layouts

Page layouts define how fields—standard and custom—look to your users and which fields are required; that is, they can't be saved unless the user enters a value. You'll want to customize your layouts so that they're attractive and easy to use. It may be tempting to create many required fields to force users to enter data; however, keep in mind that user satisfaction tends to suffer when there are too many required fields.

Here's what you can do to customize page layouts:

- Remove unnecessary fields
- Change field locations
- Create new sections
- Determine if filling in a field is required before saving

To access a page layout, go to Setup → App Setup → Customize → [choose the object] → Page Layouts

Customize Reports

Being able to easily generate reports containing the information that's most important to you is one of the great things about Salesforce CRM. With a large number of standard reports available out of the box, you can be reporting in no time.

In the planning process, you determined what information you would need to pull from Salesforce CRM based on your current business needs. Then you customized the application based on those needs.

After you add the custom fields to Salesforce CRM, it's time to re-evaluate if you have all the information you need to pull the proper reports.

Now you're ready to start creating your reports. Here's what you can do with reports:

- Customize the standard reports to better fit your business needs.
- Create custom reports from scratch and determine which fields they contain, how they're laid out, sorting options, date ranges, and charting options.
- Leverage pre-built dashboards from the AppExchange that contain all the underlying reports tied to the dashboard.

To Lead or Not to Lead?

An important step in setting up Salesforce CRM is to decide whether or not to use lead functionality. Leads are a critical part of the sales cycle of most businesses, and Salesforce CRM includes a lot of very useful lead functionality, such as analyzing how leads convert or finding your best channels. Some companies decide not to use lead functionality because it requires an additional step to turn a prospect into an opportunity. What's right for you depends on your business processes.

Take Advantage of Lead Functionality

Leads are unique among Salesforce CRM records because they come with special functionality, including:

- **Lead Conversion** – A benefit of using leads in Salesforce CRM is that it creates a separate area in which you can keep information in any kind of format to track anyone who ever expressed interest. This approach keeps a clean distinction between leads and contacts, so you don't have to worry about "dirty" data or duplicates. If you don't use leads, you can't run an analysis of how leads convert or the best channels for creating leads.
- **Reports** – Available reports show conversion rates, the time required to convert a lead, and lead channels that are the best performers when it comes to bringing in deals.
- **Merging Leads** – This functionality is critical because leads are meant to be a holding area for all prospects. Before converting leads to opportunities, you can merge duplicates to ensure high-quality data and to record all lead activity.
- **Web-to-Lead** – Getting leads from multiple channels is critical to any business. By using the Web-to-Lead functionality, you can easily create forms that capture leads from your website.

    To learn more about leads, take a look at our tip sheet within the Help & Training portal called "Getting the Most from Your Leads."

Capture Leads from Your Website

If you have decided to use leads, it makes sense to also evaluate the Web-to-Lead functionality. You probably have a website that lets prospects contact you about your product or service.

To make the most of your website:

- Customize Salesforce CRM to use Web-to-Lead functionality to capture leads when prospects fill in a form.
- Bring that information right into Salesforce CRM.

Setting up this functionality is as simple as deciding which fields to include on the Web-to-Lead form, creating a URL as a landing page (such as a "thank you" page), and clicking a button to generate the HTML code. Your webmaster will jump for joy when you deliver HTML code that's ready to deploy immediately.

- To start capturing leads from your website, go to Setup → App Setup → Customize → Leads → Web-to-Lead. For step-by-step instructions, see the "Tips for Lead Administrators" resource.

Add Users

When Salesforce CRM is set up the way you want it, you're ready to add users.

Adding users is a fairly easy task. Earlier we covered profiles and setting up your organization's role hierarchy. When you add users, you associate actual users with those profiles within your role hierarchy, so users can log in and access the data that's appropriate for them.

Adding users serves three important purposes:

- Once you add users, you can import data and automatically associate that data with the correct users.
- By associating roles and profiles with all users, you can determine how they see data, what they can do in the application, and how their data rolls up.
- When you add a user, Salesforce CRM uses that user's record to generate an invitation to log into the application.

- ➢ *Tip*: If you want to delay notifying users, be sure to uncheck the "Generate new password and notify user immediately" checkbox when you go through the process of adding users. You can edit the user records and generate usernames and passwords whenever you're ready for users to actually log in.

- ➢ **Resource**: Review the Adding Users Quick Start on the Help & Training portal.

Import Data

The final task before you're ready to go live is to import your data into Salesforce CRM. To help you, Salesforce CRM has wizards to walk you through the process and provide some tips along the way. When the import is complete, you're can start to train your users and announce that Salesforce CRM is ready for business.

Note: This import step is probably the most complex task in any Salesforce CRM project. For that reason, you may want to look into getting help from a salesforce.com consulting partner.

Most companies already have account and contact information stored somewhere—usually in Act!, Goldmine, or Microsoft Outlook, as well as in spreadsheets, on sticky notes, or in the heads of their sales reps. Getting that information out of Outlook and off the sticky notes and into your organization's knowledge base is one of the most important steps in the implementation process.

Although you could collect all these resources and enter them one by one, it's obviously not efficient to enter hundreds or even thousands of records by hand. Salesforce CRM provides a step-by-step data import wizard that walks you through the process of importing leads, accounts, and contacts.

Prepare to Import Your Data

Best practices for importing your data include having a well thought-out plan, properly preparing the data, and doing a test run.

Planning your data import includes the following steps:

- Identifying your data sources data sources: Is your data in Outlook, Act!, or in spreadsheets?
- Listing fields in your current data records.
- Mapping your current fields to the Salesforce CRM fields.

Prepare Your Data

We suggest you "scrub" your data before importing it into Salesforce CRM because starting with clean data really pays off. Remember: "Garbage in, garbage out."

Here are some tips for preparing your data:

- The Salesforce CRM import wizard was designed to work with Microsoft Excel. If necessary, export your data from any other data sources to Excel first.
- Now is a good time to standardize naming and clean up your data. For example, set standards for company names (such as International Business Machines instead of IBM) or the way countries are listed (USA instead of United States).
- Take time to weed out "dirty" data and de-duplicate people who may be in the system multiple times.
- Review your Excel file to see if you missed any critical data elements for which you haven't yet created custom fields. For example, if your sales reps are tracking the number of employees at each account, you'll need a field to store that information in Salesforce CRM.
- Map your data columns to the Salesforce CRM field names. For example, the Company field in Microsoft typically maps to the Account field in Salesforce CRM. Consider renaming the column headers in your Excel file so they match the field names in Salesforce CRM exactly. This step will simplify the mapping step in the wizard.
- Wherever possible, assign the correct owners to records. If you don't have all the records assigned, the default owner is the administrator who performs the import.
- To start importing your data, go to Data Management → Import Accounts/Contacts or Import Leads.

Test the import: Test a small sample—approximately 5 to 10 records—before going ahead with the full import. When you analyze the results of your test, try this approach:

- Build a custom report or custom view that lets you see at a glance whether the data is laid out correctly.
- Open a record and compare it against the import file. Confirm that the record's fields show what you want them to show.
- Validate the test results with selected stakeholders or power users.
- Make changes to the import file or make changes to Salesforce CRM based on the test results. For example, data could import incorrectly because it was mapped to the wrong field.
- Delete the test records and test again after making your changes. Repeat this process until you're sure the data was imported accurately and that it is displayed correctly in the reports and views your users will see.

Import Your Final Data

Once your test results meet your expectations, you're ready to import your file or files. Here are a few suggestions for importing data:

- Consider importing data during non-working hours – If the system is live for some groups before others, this approach helps avoid confusion.

➢ Give yourself some cushion for error – Don't try to import your data the day before sales training, for example.

➢ Validate your data – Run key reports and display important screens to make sure all the data was imported into the fields where it belongs and in the format you want.

  ➢ *Resource*: Review our Data Import Series, which is a comprehensive collection of videos on how to approach and run your data import.

  ➢ *Action*: Go to your Getting Started Workbook and complete the My Data Sources worksheet.

Summary and Checklist: Set Up Salesforce CRM

In this section, you learned how to define the basic Salesforce CRM settings for your company, including the company profile, the organization-wide defaults, and the role hierarchy.

Task	Completed
Company profile	
Define user access	
Define permissions	
Customize	
Add users	
Import data	

Step 3: Engage

You've done your due diligence to follow a clear plan, set up and customized Salesforce CRM to fit your needs, and scrubbed and imported your data. Now it's time to focus on training your users and driving adoption.

Develop a Training Strategy

The training strategy summarizes the overall plan. It captures business objects, documents key requirements and pain points, identifies challenges, and outlines the types of training as well as the actual training delivery schedule.

By developing a training strategy, you will provide users with clear direction on what is expected and how they'll use the application.

Don't be intimidated by planning your training. Keep it simple and to the point. The last thing you want to do is overwhelm your users; the point is to engage them. Right before training, you'll need to generate usernames and passwords for everyone who will attend.

• To generate usernames and passwords, edit the user records and select the "Generate new password and notify immediately" checkbox to automatically send an email to each user with his/her login information.

Below are some things to consider as you approach training your users.

Understand Your Audience

Knowing your audience is critical to the success of training. Different kinds of users will have distinct goals and perform different tasks in Salesforce CRM, so it's important to focus your training based on their roles.

For example, you should train your management team separately from your end users, since they will interact with the application in different ways.

This also applies to different lines of business. If you're deploying to multiple departments, you want to train your marketing users separately from sales or support.

Also, if you're deploying Salesforce CRM globally, certain factors might affect your training strategy.

Be sure to consider language, cultural differences, and time zones so that your training is appropriate for an international audience.

Provide Relevant Content

Your users will be more engaged with the training if it's relevant to them. Be sure to incorporate scenario-based training using real data so that users walk through examples they confront in their daily lives.

Start with an audience analysis to make sure you develop the right materials for the right users.

Think about what training materials you want to provide and what your deliverables will be. And always keep in mind this burning question that your users will have: "What's in it for me?" Your curriculum should answer that question.

Your materials should match the learning style of your users. The following materials are tried-and-true approaches:

- **Facilitator guides** – Include detailed instructor notes on what to emphasize, details of timing, and so on. Be sure to map these guides to your participant guides.
- **Participant guides** – Provide end-to-end, detailed training documentation. Interactive, hands-on exercises are a great way to provide realistic training.
- **Quick reference cards** – Give users something to use when they're on the job. Use the cards during training for reference and consider publishing them online later.
- **Slide shows** – Use such presentations to give your users the big picture. And remember: Keep it simple!

Deliver Effectively

Prep Work – Before users attend any live training, require them to do some "prep work" by taking online training available in our Help & Training portal. There are several courses that give users an overview of Salesforce CRM basics and terminology so they become more familiar with the application, including Getting Started: Navigating Salesforce CRM and Getting Started: Using the Sales Cloud.

Pace – When planning how you'll deliver the content, think about the pace of the training. We recommend creating multiple training sessions. Cramming all the content into one long session can overwhelm users and prevent them from retaining the information. This is especially important if your deployment of Salesforce CRM is very complex or if you're introducing new processes.

Split up your training sessions and slowly introduce your users to new functionality. Then allow them time to absorb the information and come back with questions before moving on to the next phase.

Medium – You also need to decide on the format or medium for your training sessions. We always recommend live, face-to-face training to ensure your audience is engaged. However, this may not work if your team is spread across different geographies, so you might provide users with Web training or pre-recorded training.

Q&A – Lastly, when you deliver training, be sure you leave time for feedback and questions. Also, encourage users to ask questions within the Salesforce CRM Training Chatter group you've created if questions come up after the training sessions are over.

> ➢ **Action**: Go to your [Getting Started Workbook](#) and complete the worksheets in the Developing Your Training Strategy section that correspond to the categories below.

Go Live

Now that you've you trained your users, you're ready to flip the switch and go live.

Have the executive sponsor create a Chatter post congratulating everyone on your project team, as well as the users who attended the training. Add all training materials into the Chatter group to centralize all information related to your Salesforce CRM training. Leverage the Chatter group as a means of capturing questions and feedback. You'll soon see that by centralizing the conversation into one location and having that dialogue available to all your new users, you'll see users begin to answer each other's questions and create one repository of knowledge for your Salesforce CRM rollout.

Encourage User Adoption

The key to increasing user adoption is supporting users and being responsive to their needs, tracking usage trends over time, and actively encouraging adoption. Understanding what works and what doesn't is critical, both immediately after going live and over the long term.

Here are some key steps you can take to increase adoption:

1. Support users
2. Measure adoption
3. Encourage adoption

Support Users

Supporting users is an ongoing process. It involves getting user feedback, providing ongoing training, and identifying user champions who'll help their co-workers day to day. Here are some ideas for providing user support:

- **Conduct a survey** – The AppExchange includes several survey tools you can use to let users express their likes and dislikes. Use surveys periodically to sample user opinions—and then act on them.

- **Encourage user champions** – Identify users who are enthusiastic about Salesforce CRM and encourage them to help others. Leverage their success to help inspire others.

- **Address problems quickly and publicly** – Consider any problems an early warning. Fix problems and modify the application based on feedback immediately. Communicate to users how the problems were solved and how their feedback directly impacted the application.

- **Offer refresher training** – Additional or "refresher" training doesn't have to be formal; just make sure it's appropriate for each user group. For example, sales managers and sales reps will have different issues and will need different refresher sessions.

Measure Adoption

Before you can improve adoption, you have to measure it. Then you can use incentives to actively encourage adoption.

The most common measurement of adoption is the login rate, but it can't be the only measure. For a more detailed analysis of usage and adoption, consider taking a phased approach to track progress.

During phase 1 of your deployment, you may want to know the basics:

- Are users logging in?
- Who is logging in most frequently?

As your usage evolves, so will your adoption metrics. During phase 2, you may want to get more insight into how users are interacting with Salesforce CRM by tracking information like:

- The number of accounts, opportunities, or leads being created
- Volume of activities associated with key accounts

As users get comfortable with the basics, adoption metrics in phase 3 may include things like:

- Understanding if users are creating and running reports and dashboards
- Tracking the volume of Chatter posts

Tracking improvement with these metrics are clear indicators that users are becoming more comfortable with Salesforce CRM and adoption is growing.

> ➢ **_Action_**: Go to your Getting Started Workbook and complete the Adoption Metrics section.

Encourage Adoption

Here are a few suggestions for encouraging user adoption:

- Incentives – Making your deployment of Salesforce CRM fun by offering prizes and incentives has proven a very effective way to engage users.
- User competition – Some users are very motivated by recognition, so you can use leaderboards as a tool to drive adoption. Use adoption dashboards to create a Hall of Fame and highlight users who are actively logging in to Salesforce CRM.

- Super users – Identify and reward the strongest adopters. For example, this measurement can be based on the highest number of reports or activities created or the highest number of new contacts added.

- Floor walking – After you are live on Salesforce CRM, have the administrator or super users walk the floors and sit with users at their workstations. By giving users one-to-one attention, you can understand their challenges and address them quickly.

- Communication – Create a communication plan to establish an ongoing dialogue with your users. You may need to keep them informed about future training sessions, process changes, and new Salesforce CRM features.

- Other effective tactics include:

  - o Take the approach, "If it isn't in Salesforce CRM, it doesn't exist."
  - o Tie adoption to compensation.
  - o Mandate both timeliness and data quality. Reps must enter prospects and early-stage opportunities immediately, not just before closing the deal; otherwise, you lose the advantage of early visibility and the ability to measure close ratios.

  > ➢ **_Resources_**: Install our Adoption Dashboards directly from the AppExchange to get a head start on capturing key adoption metrics. We also have one for tracking Chatter usage.

Summary and Checklist: Engage

In this section, you learned about:

1. Training end users.
2. Announcing that Salesforce CRM is live.
3. Encouraging user adoption.

STEP 4: Extend

Now that you're up and running with Salesforce CRM, you're ready for the next steps to make it a blowout success and take your sales process to the next level.

Here's what to do next:

- Introduce additional functionality
- Manage data quality
- Join the community
- Manage releases

Introduce Additional Functionality

As adoption grows, you will want to provide features that make users even more productive and efficient. For example, users love the integration of Salesforce CRM with Microsoft Outlook because they don't have switch between applications. This feature also lets you capture data previously trapped in your reps' personal computers. Here's what you can do:

1. Integrate Microsoft Outlook and email.
2. Provide productivity tools such as email templates, enhanced list views, and dashboards.

Integrate Microsoft Outlook and Email

To make users more productive, Salesforce CRM can be tightly integrated with Microsoft Outlook so that Salesforce CRM and Outlook work hand in hand:

- **Email integration** – Add emails from Outlook to a contact or lead record inside Salesforce CRM. Salesforce CRM will look up the contact based on an email match and give you the option of associating it with an opportunity as well. This functionality helps you catalog important emails and provides a tremendous boost to effective collaboration.

- **Address book integration** – When sending an email from Outlook, you can look up a contact from inside Salesforce CRM and add it to the "To" line of your email.

- **Contacts and calendar synchronization** – Salesforce CRM for Outlook lets you select which contacts and calendar events you want to synch with Salesforce CRM. Synching can be automated at scheduled intervals, and a dynamic icon indicates whether a record is up to date.

To integrate Outlook with Salesforce CRM, you first have to install Salesforce for Outlook.

> ➢ *Resource*: Review our Outlook Integration Quick Start in our Help & Training portal for information on how to get started.

Provide Productivity Tools such as Templates and Dashboards

Users love templates and dashboards because they boost productivity and help track progress and communicate key business information in ways that are easy to understand. Dashboards are great for visualizing complex information and keeping everyone on the same page—and on their toes. Get your teams to identify their key performance indicators (KPIs). Then build

dashboards that show, in real time, how they're performing. Email templates are easy to set up and use. With these templates, users can send out consistent, high-quality, personalized HTML or text emails.

> ➢ *Resource*: Review the tips for using [HTML Email Templates](#).

Manage Data Quality

For a CRM implementation to be successful, you've got to be able trust the data. Here are some rules for maintaining data quality.

- **Search before you create** – Teaching users to search before creating records can reduce data duplication. Duplicate data is inevitable, but searching first can help keep it down to a manageable level.
- **Standardize naming conventions** – Continue to reinforce standardized naming conventions for company names and addresses. For example, is it U.S.A., USA, or US? Is it Acme or Acme LLC?
- **Merge records** – Although having duplicate records may be inevitable, having a process to keep on top of duplicates is critical. Within Salesforce CRM, you can merge duplicate lead, account, and contact data with easy-to-use wizards.
- **Use the Excel Connector*** – The Excel Connector provides bi-directional access to Salesforce CRM from Excel spreadsheets to import records from Excel directly into Salesforce CRM. It also lets you perform mass updates, which can be very handy for data-cleansing projects. Although this tool is easy to install and easy to use, you need to be careful any time you're manipulating large amounts of live data.
- **Set up data quality dashboards** – With Salesforce CRM, you can set up dashboards that highlight when fields are left blank. For example, you can create a dashboard that indicates the number of times the field "Main Competitor" was left blank. You can also track overdue tasks or the last time a record was updated.
- **Adopt partner solutions** – You can use partner solutions from the AppExchange to help improve data quality. For example, Ringlead and DemandTools both automatically de-duplicate your manually created leads, Web forms, and uploaded lists.

> ➢ *Resource*: For more information about the Excel Connector, see the [Excel Connector documentation](#).

> ➢ *Note: The Excel Connector is an open source tool and is not a supported product. If you have questions, please use the [Excel Connector documentation](#) and visit our [developer website](#) where you can find more information and discussion boards on the topic.

Leverage the AppExchange

BusinessWeek magazine called the AppExchange "The eBay of Business Applications." Here you'll find hundreds of applications that work together with Salesforce CRM to increase productivity, including dashboards for sales activity, lead and opportunity management, quote generators, and much more.

> ➢ ***Resource***: Go to http://appexchange.salesforce.com and check it out!

Join the Community

Salesforce CRM users—including business users, developers, and administrators—may belong to different communities based on their jobs and interests. Salesforce CRM.com provides community sites for all types of users to find information, share ideas, respond to and rate content, and ask questions.

In addition, salesforce.com supports local user groups across the country and around the world. Join fellow users at local user group meetings, Cloudforce events, special events, and salesforce.com's yearly blowout event: Dreamforce.

Check out and join these community sites:

- **Salesforce CRM Community** – Because you're reading this information, we know you've found the Salesforce CRM Community site. Participate in discussion forums and contribute to the salesforce.com IdeaExchange to see your ideas become part of Salesforce CRM.
- **developer.force.com** – The developer network is for the technically inclined. Here you'll find wikis for all aspects of Force.com, downloads of popular books, and the chance to get a free Developer Edition account.

Manage Releases

One of the biggest advantages of Salesforce CRM is that you are always on the latest version of Salesforce CRM. We introduce new functionality as part of our releases several times a year—all without much effort on your part. And, unlike with traditional software, your customizations are never lost. When new releases become available, consider this approach:

1. Inform yourself with the following resources:

   o Visit our Community website for access to all resources related to the new release, including:

      1. Release Preview for an overview of new features.
      2. Release Notes for details, including installation instructions.
      3. Release Training.

2. Identify the most promising features for your specific requirements:

   o Use the vision and goals you defined earlier to select the features you want to activate.
   o Get input from your users to narrow your short list.
   o Sign up for the pre-release program to get your own test environment to try them out.

3. Communicate any changes to your users:

   o Leverage the Chatter group as a means to highlight information and communication strategy for your users.
   o Consider mini-training sessions to get everyone up to speed.
   o Consider using some of the adoption techniques discussed earlier.

Summary and Checklist: Extend

Your adoption rates should be increasing, and now you're ready to extend Salesforce CRM with additional applications available on the AppExchange from salesforce.com or from external partners. As your business grows, you also may want to explore the capabilities of the Salesforce CRM Enterprise and Salesforce CRM Unlimited Editions.

You now know how to increase user adoption by:

1. Introducing additional functionality to boost productivity.
2. Defining a strategy for maintaining data quality.
3. Joining the Salesforce CRM Community.
4. Defining a strategy for managing releases.

Resource Summary

- Salesforce CRM Glossary
- Salesforce CRM Community

- User guides:
    - Learning Salesforce Basics
    - Set Up and Maintain Your Salesforce CRM Organization

- Video series:
    - Who Sees What
    - Data Import

- Quick Starts:
    - Adding and Managing Users Quick Start
    - Salesforce CRM for Outlook
    - Importing Data

- Dashboards:
    - Adoption dashboards
    - Chatter usage dashboard

- Tip sheets:
    - Tips for Lead Administrators
    - Tips for Using HTML Email Templates