WORKBOOK

Salesforce CRM
Getting Started Workbook

Contents

Welcome to Salesforce CRM

This collection of worksheets will support your planning process, document your decisions, and speed up your implementation by helping you to:

- Build your team
- Define your vision
- Define and prioritize your goals
- Define key aspects of your processes and diagram the process flow
- Define fields associated with your processes
- Decide which reports you need
- Prepare to import data into Salesforce CRM

Build Your Team

Use this worksheet to identify the people who'll be critical to making Salesforce CRM a success at your company.

My Project Team		
Role Name	**Role Description**	**Team Member Name**
Executive Sponsor	Lends influence to the project by becoming the champion. Sets the business vision for the implementation.	
Project Owner	Guides the project to successful completion. Understands all business process and maps process to the Salesforce CRM implementation.	
Administrator	Gets the application up and running and manages it day to day.	
Power User	Serves as liaison to the users to ensure the application meets day-to-day needs.	

Define Your Vision

Use these sample CRM vision statements as a basis for discussion. Then come up with your own.

> *"Build and maintain long-term relationships with valuable customers by creating personalized experiences across all touch-points and by anticipating customer needs and providing customized offers."*

> *"Customer loyalty is our highest priority."*

> *"Provide the highest level of personalized service for all customers and give customers the communication channels they want"*

My Vision Statement

Set Your Goals

This section includes worksheets to help you define and prioritize your company's goals, including:

- Documenting current pain points
- Clarifying your business goals
- Prioritizing those goals

Remember that different groups will have different goals. In general, executives, sales manager, and sales reps share similar goals across different companies.

Document Your Pain Points

As a preliminary step, capture the issues various internal groups face.

See the second table for an example and delete when it is no longer needed.

My Pain Points	
Pain Points	**Group**

Sample Pain Points	
Pain Points	**Group**
Need better pipeline visibility	Sales
Difficult to quantify why deals are lost to key competitors	Sales
Leads tracked via email are being dropped	Sales
Unable to track forecasted revenue from all profit centers	Management
Difficult to prioritize top customer issues	Management
How to identify top performers in every group	Management
Can't keep track of incoming IT requests	Other group (such as IT)

Clarify Your Goals

After identifying the main pain points, define your goals in terms of the hoped-for solutions for each target group. Also define how those goals can be measured. After you complete the step related to defining your business process, return to the last item in this worksheet to complete it.

See the second table for sample business goals and delete when it is no longer needed.

My Business Goals	
What does the executive team hope to get out of Salesforce CRM?	•
How are these goals measured?	•
What do the managers hope to get out of Salesforce CRM?	•
How are these goals measured?	•
What are the goals of your end users?	•
How are these goals measured?	•

Sample Business Goals	
What does the executive team hope to get out of Salesforce CRM?	• Identify top performers • Identify top customers • Capture leads from the Web site • Know why key deals are lost
How are these goals measured?	• Dashboard to highlight top performers • Dashboard to display top deals and win rates • <x>% increase in leads
What do the managers hope to get out of Salesforce CRM?	• Better visibility into the pipeline • Better understanding of why key deals are lost • Increased close rates • Relevant reports for top management • Make sure leads aren't dropped
How are these goals measured?	• 100% of deals are shown in Salesforce pipeline reports • Increase closed rate by <x> • Reduce dropped leads from <x> to <x>
What are the goals of your end users?	• Easy access to collateral • Work online and offline • Accomplish administrative tasks more easily • Get credit for work
How are these goals measured?	• Document consistency • Increase effectiveness by <x>% • Activity reporting and dashboards • Low employee attrition

Prioritize Your Goals

Using the completed Business Goals worksheet, copy and paste each of the goals you defined into the appropriate priorities in the My Business Priorities worksheet.

See the second table for an example of how to prioritize business goals.

My Business Priorities	
Must have	•
Important	•
Nice to have	•

Sample Business Priorities	
Must have	• Identify top performers • Know why key deals are lost • Get better visibility into pipeline • Increase close rates • Create relevant reports for top management • Get credit for work
Important	• Identify top customers • Know why key deals are lost • Easy access to collateral • Accomplish administrative tasks more easily
Nice to have	• Capture leads from the Web site • Make sure leads tracked via email aren’t dropped • Work online and offline

Define Your Process

This section includes the following resources:

- A questionnaire to help define key components of your business process
- A placeholder for your business process diagram (just duplicate to create additional process diagrams)
- Worksheets to help you define the fields you need for the commonly used sales process (Lead fields, Account fields, Contact fields, and Opportunity fields).

Identify Key Aspects of Your Business Process

Modify this worksheet to include the key components associated with *your* business process.

My Business Process Questionnaire	
Companies: For which of the following do you want to track data?	❑ Prospects ❑ Customers ❑ Partners ❑ Vendors ❑ Competitors
Profiles: What key characteristics do you use to profile or segment your customers?	❑ Industry ❑ No. of employees ❑ Revenue
Contacts: What are the characteristics that define the contacts you interact with?	❑ Title ❑ Role
Partners: What types of partners do you work with? How do they help uncover opportunities for your business?	❑ Value Added Resellers ❑ Original Equipment Manufacturers ❑ Indirect Sales Channel ❑ Implementers/Installers
Sales Funnel: List the stages in your sales cycle and the percentage of closing certainty at each stage.	❑ Lead – 10% ❑ Qualified – 20% ❑ Presentation – 50% ❑ Proposal – 75% ❑ Closed Won – 100% ❑ Closed Lost – 0%
Documentation: What materials do you send to customers during the sales cycle? List the 5–10 documents you use most frequently. 1. 2. 3. 4. 5.	❑ Email templates ❑ PDF documents ❑ Proposals ❑ Quotes ❑ Other
Competition: Do you track competitive wins and losses? List your competitors and check the reasons you lose business to or win business from them. 1. 2. 3. 4. 5.	❑ Price ❑ Feature <x> ❑ Value proposition ❑ Company viability ❑ Time to value ❑ Other

Document Your Process Diagram

After reviewing the sample Salesforce processes and mapping out your own, include a sketch of that process below.

My Business Process Diagram

Define the Fields Needed for Your Process

Use the following worksheets to identify which standard Salesforce fields and picklist values fit your process. Also define which additional custom fields you need for each of the screens involved with most sales processes, including the Lead fields, the Account fields, the Contact fields, and the Opportunities fields.

Note: The * symbol means a field is required.

- Use the Want Field? column to check those fields you want to use.
- Use the Custom Field choices at the end of the table to note additional fields. Add rows as needed.

Define Your Lead Fields

My Lead Fields			
Standard Field Name	**Data Type**	**Values**	**Want Field?**
Address	Address		
Annual Revenue	Currency(18,0)		
Campaign	Lookup(Campaign)		
Company*	Text(80)		
Description	Long Text Area(32000)		
Do Not Call	Checkbox		
Email	Email		
Email Opt Out	Checkbox		
Fax	Fax		
Fax Opt Out	Checkbox		
Industry	Picklist	Agriculture Apparel Banking Biotechnology Chemicals Communications Construction Consulting Education Electronics Energy Engineering Entertainment Environmental Finance Food & Beverage Government Healthcare Hospitality Insurance Machinery Manufacturing Media Not For Profit Other Recreation Retail Shipping Technology Telecommunications Transportation Utilities	
Lead Owner	Lookup(User, Queue)		
Lead Source	Picklist	Advertisement Employee Referral External Referral Partner Public Relations Seminar – Internal Seminar – Partner Trade Show Web	

Define Your Lead Fields (continued)

Standard Field Name	Data Type	Values	Want Field?
Lead Status*	Picklist	Word of mouth Other Contacted Open (Default) Qualified (Converted) Unqualified	
Mobile	Phone		
Name*	Name		
Salutation	Picklist	Mr. Ms. Mrs. Dr. Prof.	
No. of Employees	Number(8,0)		
Phone	Phone		
Rating	Picklist	Hot Warm Cold	
Title	Text(80)		
Website	URL(255)		
Created By*	Lookup(User)		
Last Modified By*	Lookup(User)		
Last Transfer Date	Date		
Custom Field Name	**Data Type**	**Values**	

Define Your Account Fields

My Account Fields			
Standard Field Name	**Data Type**	**Values**	**Want Field?**
Account Name*	Text(80)		
Account Number	Text(40)		
Account Owner	Lookup(User)		
Account Site	Text(80)		
Annual Revenue	Currency(18,0)		
Billing Address	Address		
Description	Long Text Area(32000)		
Employees	Number(8,0)		
Fax	Fax		
Industry	Picklist	(see previous)	
Ownership	Picklist	Public Private Subsidiary Other	
Parent Account	Lookup(Account)		
Phone	Phone		
Rating	Picklist	Hot Warm Cold	
Shipping Address	Address		
SIC Code	Text(20)		
Ticker Symbol	Content(20)		
Type	Picklist	Prospect Customer Former Customer Partner Competitor Vendor VAR	
Website	URL(255)		
Created By*	Lookup(User)		
Last Modified By*	Lookup(User)		
Custom Field Name	**Data Type**	**Values**	

Define Your Contact Fields

My Contact Fields			
Standard Field Name	**Data Type**	**Values**	**Want Field?**
Account	Lookup(Account)		
Assistant	Text(40)		
Asst. Phone	Phone		
Birthdate	Date		
Contact Owner	Lookup(User)		
Department	Text(80)		
Description	Long Text Area(32000)		
Do Not Call	Checkbox		
Email	Email		
Email Opt Out	Checkbox		
Fax	Fax		
Fax Opt Out	Checkbox		
Home Phone	Phone		
Last-Stay-In-Touch Request Date*	Date/Time		
Last-Stay-In-Touch Save Date*	Date/Time		
Lead Source	Picklist	Advertisement Employee Referral External Referral Partner Public Relations Seminar - Internal Seminar - Partner Trade Show Web Word of mouth Other	
Mailing Address	Address		
Mobile	Phone		
Name*	Name		
Salutation	Picklist	Mr. Ms. Mrs. Dr. Prof.	
Other Address	Address		
Other Phone	Phone		
Phone	Phone		
Reports To	Lookup(Contact)		
Title	Text(80)		
Created By*	Lookup(User)		
Last Modified By*	Lookup(User)		
Custom Field Name	**Data Type**	**Length**	

Define Your Opportunity Fields

My Opportunity Fields			
Standard Field Name	**Data Type**	**Values**	**Want Field?**
Account Name*	Lookup(Account)		
Amount*	Currency(16,2)		
Campaign Source	Lookup(Campaign)		
Close Date*	Date		
Description	Long Text Area(32000)		
Expected Revenue*	Currency(16,2)		
Forecast Category	Picklist	Pipeline Omitted Best Case Commit Closed	
Lead Source	Picklist	Advertisement Employee Referral External Referral Partner Public Relations Seminar - Internal Seminar - Partner Trade Show Web Word of mouth Other	
Next Step	Text(255)		
Opportunity Name*	Text(80)		
Opportunity Owner	Lookup(User)		
Private	Checkbox		
Probability	Percent(3,0)		
Quantity*	Number(16,2)		
Stage*	Picklist	Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed Won Closed Lost	
Type	Picklist	Existing Business New Business	
Created By*	Lookup(User)		
Last Modified By*	Lookup(User)		
Custom Field Name	**Data Type**	**Length**	

Define Needed Reports

Use this worksheet to define which standard Salesforce reports match the business goals you defined earlier. If there isn't a standard report, decide whether you want create a custom report. Of course, some goals aren't measured with reports, such as the ability to work both online and offline.

For an example, see the worksheet below.

My Reports	
Your Prioritized Business Goals	**Standard Reports to Measure Your Goals**
	•
	•
	•
	Custom Reports Needed
	•

Sample Reports that Match Business Goals	
Your Prioritized Business Goals	**Reports to Measure Your Goals**
• Identify top performers • Better visibility into pipeline • Increased close rates • Relevant reports for top management • Get credit for work	• Sales by Rep • Opportunity Pipeline • Closed Opportunities • Closed Opportunities, Opportunity Sources, Opportunity Stage Duration, Quarterly Forecast Summary, Opportunity Pipeline Trend • Sales by Rep, Quota vs. Actual
• Know why key deals are lost • Easy access to collateral • Accomplish administrative tasks more easily	• Stuck Opportunities • N/A • N/A
• Capture leads from the Web site • Make sure leads aren't being dropped • Work online and offline	• Leads by Source • Lead Status, Neglected Leads • N/A

Prepare to Import Data

Use this worksheet to identify the following key information about your data, in preparation for importing it into Salesforce CRM. If necessary, add rows to accommodate additional data sources.

My Record Types			
Source	**Record Type**	**Needs Cleaning?**	**File Size**
Excel			
ACT!			
Goldmine			
Outlook			
PDA			

Corporate Headquarters
The Landmark @ One Market
Suite 300
San Francisco, CA, 94105
United States

1-800-NO-SOFTWARE
www.salesforce.com

Latin America
+1-415-536-4606

Japan
+81-3-5785-8201

Asia/Pacific
+65-6302-5700

Europe, Middle East & Africa
+4121-6953700