

PLAN YOUR IMPLEMENTATION

The Ultimate Salesforce Checklist

Cloud*tal*



PLANNING 01

Your Implementation

SET YOUR BUSINESS GOALS

Define a clear purpose for implementing Salesforce

Identify goals, prioritise and set measurements (What does success look like?)

Define issues of all departments

DEFINE YOUR SALES PROCESS

Define your sales stages

Define criteria for moving through each stage

Define next steps for each stage



Cloudtal

PLANNING 01

Your Implementation

DEFINE YOUR FIELDS

Define field requirements for Leads

Define field requirements for Accounts

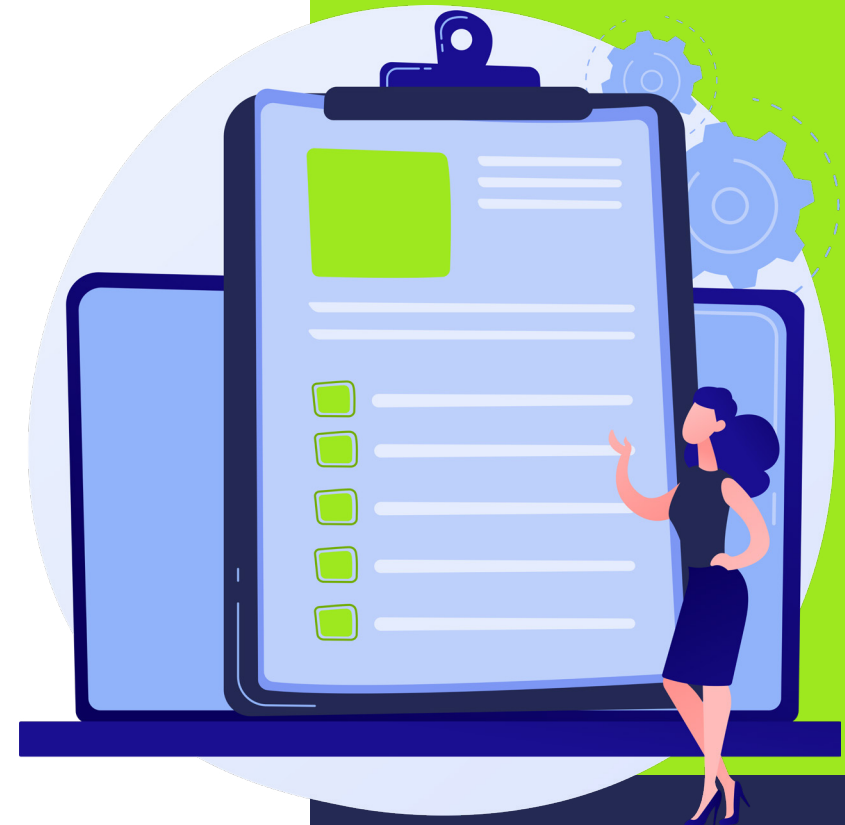
Define field requirements for Contacts

Define field requirements for Opportunities

DEFINE YOUR REPORTS & DASHBOARDS

Define reports for each group (Sales, Marketing and Management)

Define dashboard for each group (Sales, Marketing and Management)



Cloudtal

SETUP 02

Setting up Salesforce

Cloud*tal*

COMPANY DETAILS

Upload company logo

Set locale, region and currency

Set financial year

Organisation wide defaults -

Determines what users can
and can't access

SETUP USERS

Setup user profiles / user roles

SETUP LEADS

Customise fields to meet our business needs

Customise page layout (Organise/Arrange
Fields)

Setup lead source values

Setup lead stages - Lead management process

Setup web-to-lead - Capture leads from your
website

Setup lead assignment rules (do you need
email templates for lead assignment rules?)

SETUP 02

Setting up Salesforce

Cloudtal

SETUP OPPORTUNITY

Customise fields to meet our business needs

Customise page layout (Organise & Arrange Fields)

Setup opportunity status - For sales process

SETUP ACCOUNTS AND CONTACTS

Customise fields to meet our business needs

Customise page layout (Organise &
Arrange Fields)



Dumping everything into your new Salesforce system is not good practice.

Follow these steps to ensure you're importing quality data into your system.

Cloudtal

DATA 03

Importing Data

Audit the data across all sources and decide what data to import

Review the condition of your data

Clean up, remove duplicates and fix other data quality issues (spellings, punctuation, formatting)

Make sure the data is complete

Clean and format data in MS Excel before importing

Import data in the correct order

(1. Users, 2. Leads 3. Accounts 4. Contacts

5. Opportunities 6. All other objects)

Review imported data



THANK YOU FOR DOWNLOADING OUR ULTIMATE SALESFORCE CHECKLIST

We hope you found this resource useful as you look for ways to grow your business using Salesforce. As a growing business ourselves, we understand the demands, pressures and excitement of running your business. We also know that adopting new technology can be difficult, time consuming and overwhelming.

Like any venture, implementing Salesforce can be difficult at first. But we believe technology can give growing businesses a competitive advantage over their competition.

If you have any questions please feel free to call us or drop us an email.

0330 124 1292 | help@cloudtal.com