Salesforce CRM Implementation Checklist

Designed to cover every step of the rollout process. This checklist ensures you stay on track, avoid common pitfalls, and achieve a seamless implementation.

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Phase 1: Planning & Preparation

Define Objectives - List measurable goals (e.g., improving sales processes, reducing manual tasks, increasing customer insights).

Engage Stakeholders - Identify and involve key teams: Sales, Marketing, IT, Customer Support, and Management.

Document Current Processes - Map out current workflows and identify gaps or inefficiencies.

Create an Implementation Roadmap - Develop a phased approach: Discovery → Design → Development → Testing → Deployment.

1. Use tools like **Lucidchart** or **Miro** for process mapping**Assign Roles & Responsibilities**
2. Project Lead
3. Salesforce Admin
4. Implementation Team
5. Champions (for training and adoption).

Phase 2: Data Preparation & Migration

Audit Existing Data - Analyze data sources (spreadsheets, legacy systems, etc.).

Cleanse & Deduplicate Data - Use tools like **DemandTools** or **DataLoader.io**.

Create a Data Mapping Document - Map fields from the old system to Salesforce fields.

Test Migration in Sandbox - Run a test migration and validate the data integrity.

Finalize Data Migration - Perform final migration into Salesforce.

Verify Data Accuracy - Review all data for errors or missing information.

Phase 3: System Configuration & Customization

Set Up Salesforce Org - Configure company details, time zones, and currencies.

Leverage Standard Features - Use out-of-the-box features (like Leads, Opportunities, and Dashboards).

Minimal Customization - Only add custom fields, workflows, and automation *where necessary*.

Set Up User Roles & Permissions - Define user profiles, permissions, and access levels.

Integrate Tools & Applications - Integrate essential apps (e.g., email, marketing automation, or ERP systems).

Perform System Testing - Test features, workflows, and integrations in a sandbox environment.

Phase 4: User Adoption & Training

Develop a Training Plan - Use **Salesforce Trailhead** for role-specific training.

Train Admins & Super Users - Train internal champions who will guide the broader team.

Onboard End Users - Conduct workshops, Q&A sessions, and hands-on training.

Gather Feedback - Use surveys (e.g., SurveyMonkey) to identify user challenges.

Address Adoption Challenges - Create incentives (like Super User of the Month).

Phase 5: Go-Live & Post-Launch

Finalize Testing - Perform final testing in the production environment.

Launch System - Communicate go-live details to all stakeholders.

Provide Post-Launch Support - Set up a help desk or point of contact for immediate concerns.

Monitor User Adoption - Track login rates, data entry consistency, and user activity.

Conduct Regular Audits - Audit permissions, access levels, and workflows regularly.

Optimize & Scale - Gather ongoing feedback and implement improvements.

Bonus Tools to Use:

1. **Process Mapping:** Lucidchart, Miro
2. **Data Migration:** DataLoader.io, DemandTools
3. **Adoption Tracking:** Salesforce Optimizer, Trailhead
4. **Feedback Collection:** SurveyMonkey, Google Forms

Final Checklist Before Go-Live

1. Data migration validated and error-free.
2. User roles and permissions reviewed.
3. Training completed for all users.
4. Key workflows and automation tested.
5. Communication plan for go-live shared.

Want to Ensure a Smooth Rollout?

Download this checklist as a **PDF** or schedule a **FREE 30-Minute Implementation Consultation** with our Salesforce experts!

This checklist covers all critical phases and actionable steps to streamline your Salesforce implementation process.