# 50-point checklist to conquer Salesforce

Salesforce implementation is a roller coaster ride. Some enjoy the process, for the fun thing it can turn out to be. But then it can be scary and topple you down, when you least expect it to. A rule book always comes in handy to help you finish the ride smoothly.

Whether you plan to work with an implementation consultant or configure the system yourself, defining the requirements clearly and precisely goes a long way in ensuring an effective implementation. In case you are planning to join hands with Salesforce, this checklist will streamline your thinking and steer you in the right direction.

## Organizational Readiness

- [ ] 1. Have you figured out what you want to achieve with Salesforce?
- [ ] 2. Do you understand Salesforce's basic
- [ ] 3. Do you understand about Salesforce communities?
- [ ] 4. Do you appreciate how the functions in Salesforce translate into non-profit space?
- [ ] 5. Do you have a timeline and a specific launch date for this activity?
- [ ] 6. Is this implementation driven by a specific event in the future or any other reason?
- [ ] 7. Have you set expectations on milestones, resources, and training requirements for implementing  Salesforce?
- [ ] 8. Have you finalized which departments would you want?
- [ ] 9. Do you have set responsibilities such as DBA, Fundraising, Marketing, Project Manager, System Support and Technical Lead?
- [ ] 10. Do you follow a process for interaction with donors and prospective donors?
- [ ] 11. Do you follow a process for interaction with volunteers and prospective volunteers?
- [ ] 12. Are you planning a change in the way your organization is run?
- [ ] 13. Do you have a set Role Hierarchy in your organization?
- [ ] 14. Have you planned the budget for this activity?

## Technology Readiness

- [ ] 15. Are you currently using any CRM system?
- [ ] 16. Are you planning to integrate your website with Salesforce (e.g. for processes such as donation and volunteer registration)?
- [ ] 17. Would you need a full time Salesforce Administrator on staff?
- [ ] 18. Do you have the knowledge and expertise to check for active workflows and triggers?
- [ ] 19. Would you need an implementation partner or do you plan to do it yourself?
- [ ] 20. Have you planned the customizations and add-on apps required to suit your business flow?
- [ ] 21. Do you have a few pilot users to test the system?

## System Scope Definition

☐ 22. Have you thought of other applications that you might need?

☐ 23. Have you listed down the must have and good to have features/ modules?

☐ 24. Have you worked on the possible use cases to illustrate your case-handling process?

☐ 25. Do you have the rules laid down for assignments, auto-responses, escalation, workflowand validation?

☐ 26. Do you know what information you'd like to track in Salesforce?

☐ 27. Do your users interact with your constituents using tasks, calendar, notes, actions, documents, email templates etc.?

☐ 28. Have you thought about the activities (such as fundraising, donation) for which you would want to use Salesforce?

☐ 29. Have you thought about the tools that you would want to integrate with Salesforce?

☐ 30. Do you know how much space you would need for data?

## Data Preparation and Migration

☐ 31. Do you have or plan to have multiple systems sharing or exchanging data?

☐ 32. Have you checked if all the required fields are populated?

☐ 33. Have you figured how you will handle duplicate records?

☐ 34. Do you have the information about system "time/date stamped" fields (i.e. record created date, record created by, last modified date, last modified by)?

☐ 35. Have you determined what data should and should not be migrated into Salesforce CRM?

☐ 36. Have you determined the data sources for your organization?

☐ 37. Do you know how and when to back up the existing data?

☐ 38. You might have to collapse the information from multiple tables down to one to suit Salesforce's data model. Will you be able to handle this?

☐ 39. Do you have the capability to cleanse, dedupe and format the data?

☐ 40. Will you be able to translate to the standardized data format required for Salesforce?

## Configuration

☐ 41. Have you figured how you will handle record ownership?

☐ 42. Have you figured the type of automations you would like to have using Salesforce?

☐ 43. Have you thought of the organization wide default values?

☐ 44. Have you planned the security and sharing settings for record access?

☐ 45. Have you mapped your existing processes to Salesforce's feature set?

☐ 46. Do you know the order in which processes should be migrated to the cloud?

☐ 47. Do you have the need for multiple languagesupport?

☐ 48. Do you have the need to capture local currencies?

☐ 49. Do you have the workflows diagramed and priorities established to handle system conflicts?

☐ 50. Have you thought of security protocols for users and third parties (CRM vendor and consultants)?

If you have a detailed plan in place, you should be able to implement Salesforce on your own. However, in case you find any of the hurdles challenging, we are just a shout away. We can ensure you are ready to evade the pitfalls before you encounter them and prepare your team for the adventure that Salesforce is.