Hello Team,

As Project Lead, I have considered our Salesforce CRM access requirements, focusing on operational efficiency and data integrity.

Proposed Permission Settings with Examples:

- **CEO**: With 'System Administrator' privileges, the CEO can oversee CRM integrations with new acquisitions—a vital capability post-recovery.
- **Project Leads (A, B, C)**: A 'Manager' profile would enable, for instance, Project Lead A to adjust the sales pipeline to align with project forecasts.
- **Engineers & Designers**: Under 'Standard User,' Engineers could use customer feedback to refine product design without accessing sensitive sales data.
- **Salespersons**: The 'Sales User' profile lets them manage relationships, like tracking follow-ups on leads from the latest campaign.

These suggestions are crafted to ensure that access is necessary and sufficient for each role's success.

I appreciate everyone's active participation in our discussions. I will be compiling all our inputs into a conclusive draft that will help finalize our CRM setup.

Best regards,

Avinash

Reference:

(n.d.). *Create a Salesforce Permission Set*. Salesforce. https://help.salesforce.com/s/articleView?id=sf.task_create_a_sf_perm_set.htm&type=5