**Getting Started**

**Workbook**

**Table of Contents**

[**Step 1: Prepare** 1](#_Toc347832943)

[**Identify Your Key Players** 1](#_Toc347832944)

[**Define and Prioritize Your Goals** 3](#_Toc347832945)

[**Document Current Pain Points** 3](#_Toc347832946)

[**Define Your Goals** 4](#_Toc347832947)

[**Prioritize Your Goals** 5](#_Toc347832948)

[**Define Your Rollout Plan** 6](#_Toc347832949)

[**Define Key Aspects of Your Process and Diagram the Process Flow** 7](#_Toc347832950)

[**Outline the Key Aspects of Your Sales Process** 7](#_Toc347832951)

[**Create Your Process Overview** 9](#_Toc347832952)

[**Define the Fields Needed for Your Process** 9](#_Toc347832953)

[**Define Your Lead Fields** 9](#_Toc347832954)

[**Define Your Account Fields** 12](#_Toc347832955)

[**Define Your Contact Fields** 14](#_Toc347832956)

[**Define Your Opportunity Fields** 15](#_Toc347832957)

[**Decide Which Reports You Need** 17](#_Toc347832958)

[**Step 2: Set Up Salesforce CRM** 18](#_Toc347832959)

[**Prepare to Import Your Data** 18](#_Toc347832960)

[**Step 3: Engage** 19](#_Toc347832961)

[**Identify Your Audience** 19](#_Toc347832962)

[**Provide Relevant Content** 19](#_Toc347832963)

[**Deliver Effectively** 19](#_Toc347832964)

[**Training Methodology Example** 20](#_Toc347832965)

[**Adoption Metrics** 21](#_Toc347832966)

Welcome to Salesforce CRM!

This collection of worksheets supports your planning process and speeds up your implementation, by giving you a place to document your decisions and helping you to:

* Build your team
* Define your vision
* Define and prioritize your goals
* Define key aspects of your process and diagram the process flow
* Define your rollout plan
* Define which reports you need
* Prepare to import data into Salesforce CRM

Sample worksheets are provided for some of the worksheets; these can simply be deleted when they are no longer needed.

# **Step 1: Prepare**

### **Identify Your Key Players**

Use this worksheet to identify the people who will 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 deployment. |  |
| Project owner | Guides the project to successful completion. Understands all business processes and maps them to the Salesforce CRM implementation. |  |
| System administrator | Gets the application up and running and manages it day to day. |  |
| Power users | 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 the discussion. Then, establish 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 service.”

“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** |
|  |

## **Define and Prioritize Your Goals**

This section includes worksheets to help you:

* Document current pain points
* Clarify your business goals
* Prioritize those goals

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

### **Document Current Pain Points**

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

| **My Pain Points (SAMPLE)** | | | |
| --- | --- | --- | --- |
| **Pain Point** | | **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 | |
| We need a better way to track leads | | Sales/Marketing | |
| We need a way to track the ROI of our marketing efforts | | Marketing | |
| 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 | |
| Cannot keep track of incoming IT requests | | Other group (IT/Operations) | |

| **My Pain Points** | |
| --- | --- |
| **Pain Point** | **Group** |
|  |  |
|  |  |
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### **Define 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.

| **My Business Goals (SAMPLE)** | |
| --- | --- |
| What does the executive team hope to get out of Salesforce CRM? | * Identify top performers * Identify top customers * Capture leads from the website * Know why key deals are lost * Better communication both internally and externally |
| 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 are not dropped |
| How are these goals measured? | * 100% of deals are shown in Salesforce CRM pipeline reports * Increase closed rate by x% * Reduce dropped leads from x to x |
| What are the goals for 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 |

|  |  |
| --- | --- |
| **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 for your end users? |  |
| How are these goals measured? |  |

### **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.

|  |  |
| --- | --- |
| **My Business Priorities (SAMPLE)** | |
| 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 website * Make sure leads tracked via email are not dropped * Work online and offline |

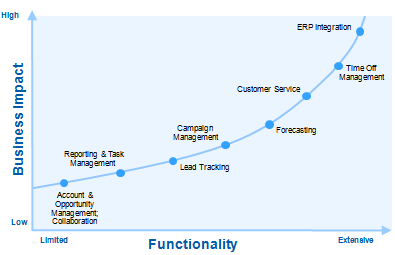
|  |  |
| --- | --- |
| **My Business Priorities** | |
| Must have |  |
| Important |  |
| Nice to have |  |

## **Define Your Rollout Plan**

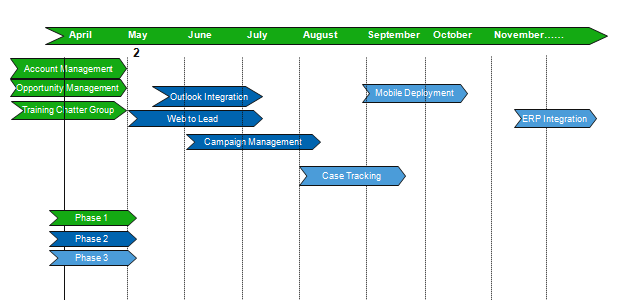
You may want to introduce functionality with a phased approach, focusing first on the most critical aspects of your implementation. It’s a good idea to document what you plan to implement first and then build out your roadmap for later phases.

Here are 2 examples:

**Example 1:**

****

**Example 2:**

****

## **Define Key Aspects of Your Process and Diagram the Process Flow**

This section includes the following resources:

* A questionnaire to help define key components of your business processes
* 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 most commonly used sales processes (Lead fields, Account fields, Contact fields, and Opportunity fields)

### **Outline the Key Aspects of Your Sales Process**

Modify the worksheet below 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 (OEMs)   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 – 25%   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   Value proposition   Company viability   Time to value   Other |

### 

### **Create Your Process Overview**

Map out your own process by sketching the process below:

|  |
| --- |
| **My Business Process Diagram** |
|  |

### **Define the Fields Needed for Your Process**

Use the following worksheets to identify which standard Salesforce CRM 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 Opportunity 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**

| **Standard Field Name** | **Data Type** | **Values** | **Want Field?** |
| --- | --- | --- | --- |
| Address | Address |  |  |
| Annual Revenue | Currency (18,0) |  |  |
| Campaign | Lookup (Campaign) |  |  |
| Company\* | Text (80) |  |  |
| Created By\* | Lookup (User) |  |  |
| 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 -Recreation -Retail -Shipping -Technology -Telecommunications -Transportation -Utilities -Other |  |
| Last Modified By\* | Lookup (User) |  |  |
| Last Transfer Date | Date |  |  |
| Lead Owner | Lookup (User, Queue) |  |  |
| Lead Source | Picklist | -Advertisement -Employee Referral -External Referral -Partner -Public Relations -Seminar Internal -Seminar Partner -Trade Show -Web -Word of mouth -Other |  |
| Lead Status\* | Picklist | -Open -Contacted -Qualified -Unqualified |  |
| Mobile | Phone |  |  |
| Name | Name |  |  |
| Salutation | Picklist | -Mr. -Ms. -Mrs. -Dr. -Prof. |  |
| First Name | Text (40) |  |  |
| Last Name | Text (80) |  |  |
| No. of Employees | Number (8,0) |  |  |
| Phone | Phone |  |  |
| Rating | Picklist | -Hot -Warm -Cold |  |
| Title | Text (80) |  |  |
| Website | URL (255) |  |  |

|  |  |  |
| --- | --- | --- |
| **Custom Field Name** | **Data Type** | **Values** |
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#### **Define Your 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) |  |  |
| Account Source | Picklist |  |  |
| Annual Revenue | Currency (18,0) |  |  |
| Billing Address | Address |  |  |
| Created By\* | Lookup (User) |  |  |
| Description | Long Text Area (32000) |  |  |
| Employees | Number (8,0) |  |  |
| Fax | Fax |  |  |
| 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 -Recreation -Retail -Shipping -Technology -Telecommunications -Utilities -Other |  |
| Last Modified By\* | Lookup (User) |  |  |
| Ownership | Picklist | -Public -Private -Subsidiary -Other |  |
| Parent Account | Lookup (Account) |  |  |
| Phone | Phone |  |  |
| Rating | Picklist | -Hot -Warm -Cold |  |
| Shipping Address | Address |  |  |
| SIC Code | Text (20) |  |  |
| SIC Description | Text (80) |  |  |
| Ticker Symbol | Content (20) |  |  |
| Type | Picklist | -Analyst -Press -Competitor -Prospect -Customer -Reseller -Integrator -Investor -Partner -Other |  |
| Website | URL (255) |  |  |

|  |  |  |
| --- | --- | --- |
| **Custom Field Name** | **Data Type** | **Values** |
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#### **Define Your Contact Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| **Standard Field Name** | **Data Type** | **Values** | **Want Field?** |
| Account Name | Lookup (Account) |  |  |
| Assistant | Text (40) |  |  |
| Asst. Phone | Phone |  |  |
| Birthdate | Date |  |  |
| Contact Owner | Lookup (User) |  |  |
| Created By\* | 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 Modified By\* | Lookup (User) |  |  |
| 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. |  |
| First Name | Text (40) |  |  |
| Last Name | Text (80) |  |  |
| Other Address | Address |  |  |
| Other Phone | Phone |  |  |
| Phone | Phone |  |  |
| Reports To | Lookup (Contact) |  |  |
| Title | Text (80) |  |  |

|  |  |  |
| --- | --- | --- |
| **Custom Field Name** | **Data Type** | **Values** |
|  |  |  |
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#### **Define Your Opportunity Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| **Standard Field Name** | **Data Type** | **Values** | **Want Field?** |
| Account Name\* | Lookup (Account) |  |  |
| Amount\* | Currency (16,2) |  |  |
| Close Date\* | Date |  |  |
| Created By\* | Lookup (User) |  |  |
| Description | Long Text Area (32000) |  |  |
| Expected Revenue | Currency (16,2) |  |  |
| Forecast Category | Picklist | -Omitted  -Pipeline  -Best Case  -Commit  -Closed |  |
| Last Modified By\* | Lookup (User) |  |  |
| 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) |  |  |
| Primary Campaign Source | Lookup (Campaign) |  |  |
| 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 Won -Closed Lost |  |
| Type | Picklist | -Existing Business -New Business |  |

**Opportunity Custom Fields**

|  |  |  |
| --- | --- | --- |
| **Custom Field Name** | **Data Type** | **Values** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## **Decide Which Reports You Need**

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

|  |  |
| --- | --- |
| **Reports that Match My Business Goals (SAMPLE)** | |
| **My Prioritized Business Goals** | **Standard Reports to Measure My Goals** |
| * Identify top performers * Better visibility into pipeline * Increased closed 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 website * Make sure leads are not being dropped * Work online and offline | * Leads by source * Lead status, neglected leads * n/a |

|  |  |
| --- | --- |
| **Reports that Match My Business Goals** | |
| **My Prioritized Business Goals** | **Standard Reports to Measure My Goals** |
|  |  |
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The best place to begin building your dashboards is the [AppExchange](http://appexchange.salesforce.com/). Here you can download high-quality dashboards that provide best practice reports in a variety of areas, including Sales & Marketing, Customer Service, Adoption, Lead & Opportunity Management, Mobile, and more.

Search for “dashboards” then browse all the options you have at your disposal. These dashboards can be downloaded into your instance of Salesforce CRM, then modified and enhanced as you see fit.

# **Step 2: Set Up Salesforce CRM**

### **Prepare to Import Your 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 |  |  |  |

# **Step 3: Engage**

### **Identify Your Audience**

|  |  |
| --- | --- |
| **Identify Your Audience (SAMPLE)** | |
| **Audience** | **Number of Participants** |
| Sales users | 7 |
| Sales managers | 3 |
| Marketing users | 2 |
| Service reps | 3 |
| Executives | 2 |

|  |  |
| --- | --- |
| **Identify Your Audience** | |
| **Audience** | **Number of Participants** |
|  |  |
|  |  |

### **Provide Relevant Content**

|  |  |
| --- | --- |
| **Training Materials** | |
| Facilitator guides |  |
| Participant guides |  |
| Quick reference cards |  |
| Slide shows |  |

### **Deliver Effectively**

|  |  |
| --- | --- |
| **Delivery** | |
| Pre-work training |  |
| Onsite training |  |
| Virtual training |  |
| e-Learning |  |
| Brown bag sessions |  |
| Blended approach |  |

### **Training Methodology Example**

Here’s a sample training methodology. For smaller deployments with fewer resources, one person may be responsible for handling all aspects of training. Use this as guidance, but tailor it to your needs, audience, and available resources.

Training Methodology

Training Strategy

Content development

Deploy training

Training Lead

Instructional designer

Instructors

* Business Objectives, KPIs, WIIFM (what’s in it for me)
* Training Approach
* Curriculum development
* Training Delivery
* Evaluation and Feedback
* Post deployment support structure
* Adoption recommendations
* Assumptions and risks
* Audience analysis
* Curriculum approach
* Tracks
* Deliverables:
  + Facilitator Guides
  + Participant Guides
  + Quick reference guides
  + Presentation decks
* Train the trainer
* Power user training
* Leadership training
* End user training
* Ongoing new hire training
* Training Medium:
  + Onsite Training
  + Virtual Training
  + e-learning
  + Brown bag sessions
  + Blended approaches

Training environment (sandbox, production)

Adoption dashboards (What to measure and how to train to it?)

## **Adoption Metrics**

Once you go live with Salesforce CRM, you can begin tracking adoption. We recommended installing our [adoption dashboards](http://appexchange.salesforce.com/listingDetail?listingId=a0N30000004gHhLEAU) directly from the AppExchange to get a head start on capturing key adoption metrics. We also have one for tracking [Chatter usage](http://appexchange.salesforce.com/listingDetail?listingId=a0N30000003IYLqEAO).

Use the tables below to document how you’ll measure progress by identifying what adoption means to your organization and how you will measure it. Typically, customers take a phased approach to analyze adoption. It’s important to have quick wins and provide encouragement to users, so make your goals realistic and celebrate achievements and milestones.

**Phase 1**

|  |  |
| --- | --- |
| **Key Questions** | **Sample Metrics** |
| Are users logging in? | % of users logging into Salesforce CRM |
| Are users using the application? | # activities created  # of active licenses |
| Who is logging in most frequently? | Login leaderboard  Hall of Fame |

**Phase 2**

|  |  |
| --- | --- |
| **Key Questions** | **Sample Metrics** |
| Are key functionalities being utilized? | # accounts/contacts/opportunities created  # of accounts with activities |
| Are users interacting with the application? | Average # of opportunities associated to an account |

**Phase 3**

|  |  |
| --- | --- |
| **Key Questions** | **Sample Metrics** |
| Are users taking advantage of the functionalities? | % of opportunities w/opportunity line items  % of users running pipeline reports |
| Are they collaborating effectively? | # of Chatter feed posts |

|  |  |
| --- | --- |
| **My Adoption Metrics** | |
| **Key Questions** | **Sample Metrics** |
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