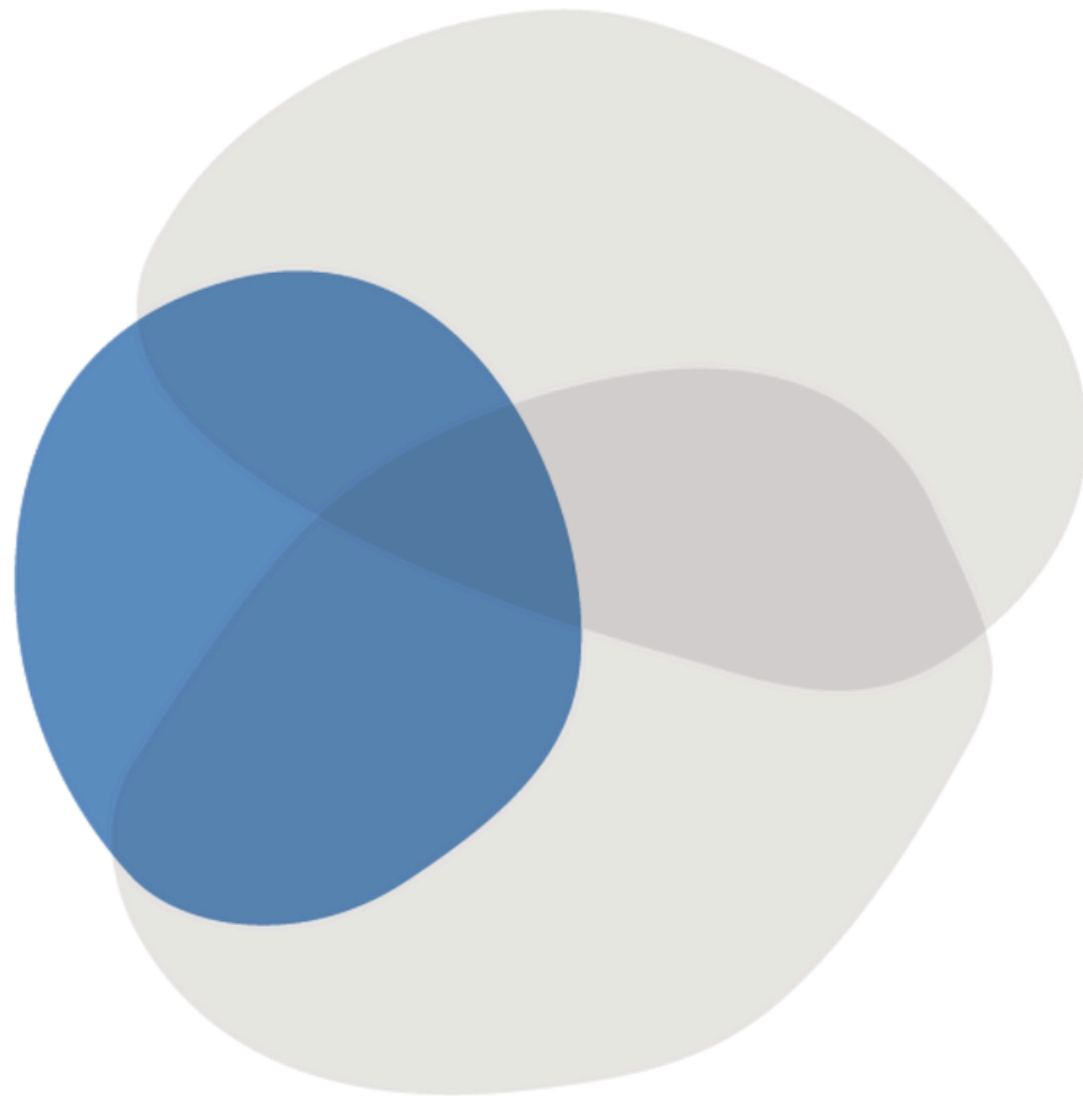**love unITed Solutions**
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Roadmap to Project Success

Here's your next-step strategy for a smooth, scalable Salesforce optimization journey.

Your Starting Point

Based on your current Salesforce environment and responses, you're taking the right steps to enhance, optimize, or expand your setup. Here's what we've identified as your baseline:

🔍 Awareness of Current State
You've taken the first step by evaluating your systems, workflows, and goals.

🧱 Foundational Insights
Your answers help clarify where strengths exist—and where support may be needed.

📊 Goal-Oriented Mindset
You're thinking ahead about what success could look like, even if the path isn't fully defined yet.

Wherever you are, the journey begins with clarity. Let's build from there.

Foundation & Planning

Goals: Clarify scope, align stakeholders, and establish baseline metrics.

TIME:
Weeks 1 - 3

DIFFICULTY:
★★☆☆☆
(Moderate)

WHAT YOU'LL NEED:
Documented business processes, Access to current CRM setup, Budget Visibility, Strategic KPIs

PARTICIPANTS:
Project Sponsor / Executive Sponsor Operations / Sales / Service Leaders

- 📄 Finalize documentation for Sales, Service, and Fulfillment processes.

- 🧼 Audit and clean existing CRM data.

- 💰 Confirm budget allocations for licenses, implementation, and support.

- 👥 Secure executive sponsor alignment and communicate project vision.

- 📊 Identify key enhancement KPIs (e.g., win rate, pipeline velocity).

Discovery & Strategy Design

Goals: Define an actionable solution design.

TIME:
Weeks 4 - 6

DIFFICULTY:
★★★☆☆
(Moderate–High)

WHAT YOU'LL NEED:
Business process maps, Tool inventory and system architecture, list of integration requirements, user feedback / pain points

PARTICIPANTS:
Salesforce Admin / Solution Architect
Department SMEs (Sales, Marketing, Support)
IT Lead or Integration Engineer

- 🔍 Map current-state automation and data flows.

- 🧩 Identify all systems needing Salesforce integration.

- 🔐 Evaluate org security model, permissions, and data sharing.

- 🎯 Document target go-live/optimization timeline.

- 🧠 Assess team experience and outline training needs.

Implementation & Configuration

TIME:
Weeks 7 - 10

DIFFICULTY:
★★★★☆ (High)

WHAT YOU'LL NEED:
Approved solution design, access to Salesforce sandbox and production orgs, Test cases and data.

PARTICIPANTS :
Salesforce Admin / Developer, QA Tester, Change Manager, End-user pilot group

Goals: Deliver scalable enhancements.

- ⚙️ Automate key workflows using Flow or third-party tools.

- 🧩 Integrate with existing tools (ERP, marketing, support platforms).

- 🏗️ Configure objects, fields, and reports to align with measurable goals.

- ✅ Test against user stories and pilot with super users.

Training, Adoption & Launch

TIME:
Weeks 11 - 13

DIFFICULTY:
★★★☆☆
(Moderate)

WHAT YOU'LL NEED:
Training materials, communication plan, UAT Feedback log, Launch checklist.

PARTICIPANTS:
Training Lead / Change Management consultant, Departmental Champions, Help Desk / Support Team, All End Users

Goals: Ensure team adoption and rosiness for go-live.

- 👨‍🏫 Deliver live or recorded training sessions.

- 📚 Provide ongoing onboarding materials and FAQ support.

- 🧪 Conduct UAT (User Acceptance Testing) and resolve final bugs.

- 🚀 Launch with a communication plan and success celebration.

Post-Go-Live Optimization

Goals: Refine and scale based on real usage.

TIME:
Weeks 14+

DIFFICULTY:
★★☆☆☆ (Low–Moderate)

WHAT YOU'LL NEED:
Usage dashboards and reporting tools, feedback collection process, enhancement backlog, iteration schedule

PARTICIPANTS:
Salesforce Admin, Power Users / Departmental Leads, Support / IT Analyst, Executive Sponsor

- 🔄 Review adoption metrics and gather team feedback.

- 📈 Iterate enhancements to dashboards, automations, and UX.

- 🔍 Schedule monthly performance reviews against KPIs.

- 💬 Maintain an internal Salesforce user group for ongoing engagement.

Need Help Executing This Roadmap?

Book a free consultation with our team to discuss how we can support your success with expert strategy and implementation.

Let's Talk

Thank You!