salesforce

Getting Started Workbook

Tip: Click any page number to go directly to that page.

ABOUT THE WORKBOOK

Welcome to Salesforce!

We’ve designed this Getting Started Workbook to help you get off to a great start. Now you can fast-track your deployment in four steps:

Step 1: Prepare for Success
Determine who is involved and how to focus your journey.

Step 2: Create the User Experience
Adapt Salesforce to enable and improve your business processes.

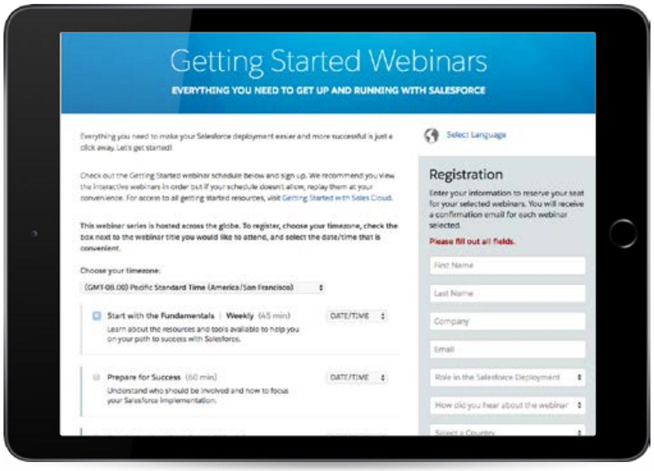
Step 3: Enable the User Experience with Data
Import clean data and create valuable reports.

Step 4: Deploy and Empower Your Users
Train, support, motivate, and engage your users by driving business outcomes.

Use this workbook to capture your goals, track your setup checklist, and find Salesforce resources.

Ready to begin? Visit Getting Started with Sales Cloud, your online hub for everything you need to get up and running with Salesforce:

- Getting Started Webinars Attend this series of interactive webinars to learn best practices and proven approaches for your Salesforce implementation. The four steps in this workbook align to the four webinars in the series.
- Getting Started Videos You can also watch the Getting Started series as on-demand videos. (The four steps in this workbook also align to the four videos.)
- Success - Getting Started Community
  Join this forum to ask questions and get answers from Salesforce experts and customers just like you.



Tip: Visit the Success Journey Hub to access all journeys available to help you get started, achieve business objectives, or solve challenges. You can browse resources by area of interest, like Sales, Service, or Marketing.

Premier Success Plan customers: Explore the Premier Toolkit or more resources, including the Premier Training Catalog and role-based learning paths.

Premier Success and Administration customers: Be sure to review the Admin Services section to learn how to request help from your Premier Administrator.

STEP 1: Prepare for Success

Watch the Prepare video or attend the Prepare webinar to learn how to define your vision, inspire your team, and plan your journey with the following activities:

Determine Your Key Players

Use this worksheet to identify the people who will be critical to making Salesforce a success at your company. Individuals can have multiple responsibilities.

- **Executive Sponsor:** Champions the project and sets the business vision for deployment.
- **Business Process Owner:** Knows the sales process steps and maps them to Salesforce.
- **System Administrator:** Configures Salesforce and manages it day-to-day.
- **Data Analyst:** Understands the current data and owns its consolidation and mapping.
- **Champion:** Serves as the liaison to users to ensure Salesforce meets day-to-day needs.

Key Players

System Administrators
- Supports business process mapping
- Configures Salesforce
- Trains and supports end users

Business Process Owner
- Intimate knowledge / understanding of sales process steps
- Maps process steps to Salesforce
- Design validation and testing

Supporting Players

Data Analyst
- Intimate knowledge of current data
- Owns data mapping and consolidation strategy in Salesforce

Champion
- Passionate about Salesforce implementation
- Ensures Salesforce is meeting end user needs and drives adoption

Executive Sponsor
- Articulates the value and encourages adoption
- Communicates the strategy

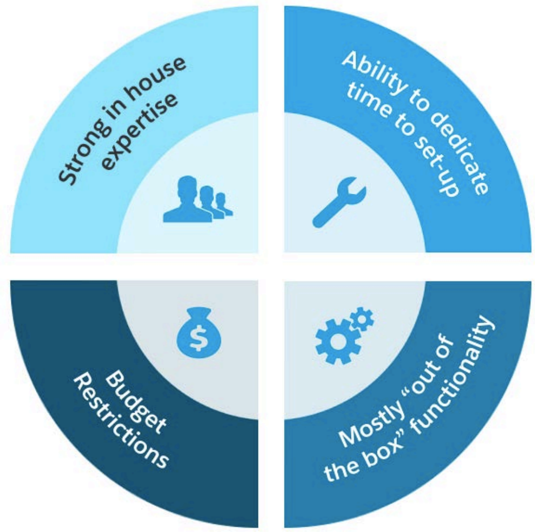
Key Responsibilities

	Key Players		Supporting Players		
	Business Process Owner	System Administrator	Data Analyst	Champion	Executive Sponsor
Sample	X	X			
Individual 1					
Individual 2					

Consider the Type of Implementation Support You Need

Determine if you're going to use a partner or self-implement. Use these resources to help guide you through the process:

- Consult with your Salesforce Account Executive
- Review partners on the AppExchange
- Review Successfully Implement with Salesforce Partners



Gather Feedback and Determine Your Validation Approach

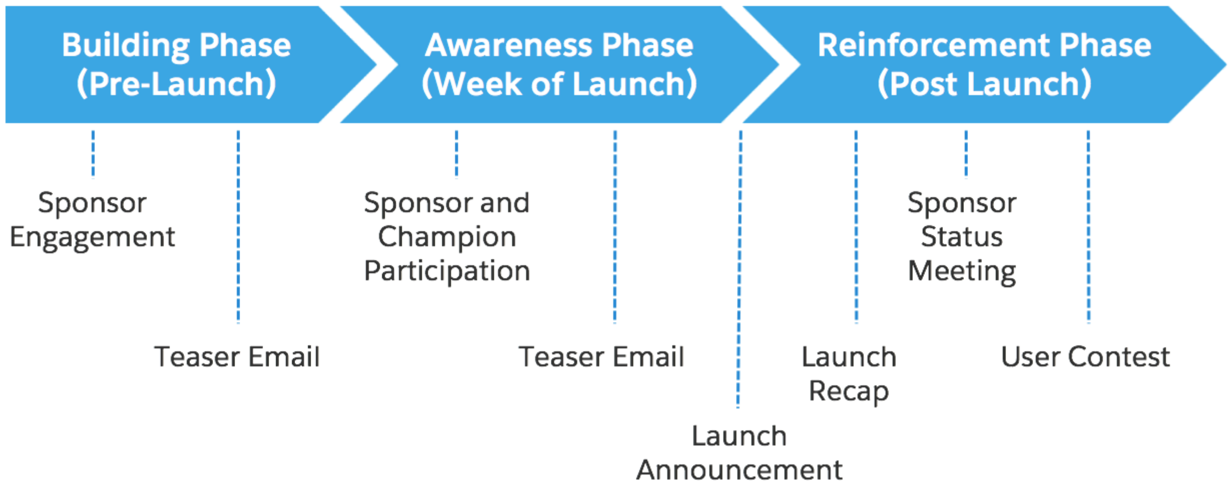
A successful implementation includes ways to gather feedback and end-user validation to determine if you're meeting your objectives. Think about who will be involved and what you'll need for user validation.

(Sample) My Validation Plan

Key Questions	Approach
Who will validate the Salesforce solution? (Consider who is most capable of testing the business process.)	• Sales reps: John Scott, Helen Campbell • Sales manager: Ted Taylor • Sales assistant: Joe Zurich • Executive: Joanne Hunt
What are the needs for my environment?	Test sandbox with configuration, user setup, and a small amount of data.
What are the key considerations for timing?	• Avoid end of quarter. • Work around spring break and the April conference.

Get the Word Out

Determine the timing, owners, and key topics to build enthusiasm and keep users updated on the Salesforce initiative.



Create Your Communication Plan

(Sample) My Communication Plan

Prelaunch	Launch	Post-Launch
Program vision	Instructions on how to access Salesforce	User recognition
Key players	How to get help: questions and training	User tips and tricks
Business goals		Reminder of how to get help and ask questions
Note: Many of the prelaunch topics can be sharing the information you’ve captured in Step 1 of this workbook.		

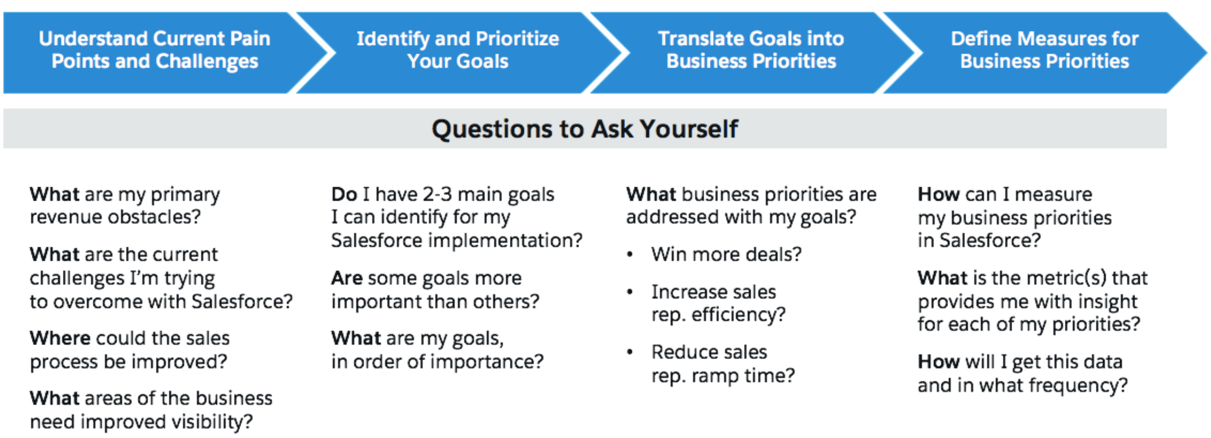
My Communication Plan

Prelaunch	Launch	Post-Launch

Identify and Prioritize Your Business Objectives

Set the destination for Salesforce by defining your vision, identifying pain points to address, capturing and prioritizing your goals, and defining measurements to determine if you're achieving your goals.

1. Define your goals
2. Identify your pain points
3. Capture and prioritize your goals, and define measurements



1. Define your goals

Define a clear purpose for your Salesforce initiative, drive ongoing commitment, and provide a way to measure and prove results. Ask questions such as: What will my business look like in three to five years? What future customer needs do I want to satisfy?

(Sample) My Vision Statement

- Build and maintain long-term relationships with valuable customers by creating personalized experiences across all touchpoints, anticipating customer needs, and providing customized service.
- Customer loyalty is our highest priority.
- Provide the highest level of personalized service and give customers the communication channels they want.

Vision Statement

2. Identify your pain points

First, capture the issues that various groups are facing.

(Sample) My Pain Points

Pain Point	Group
Need better pipeline visibility.	Sales
Difficult to quantify why deals are lost to key competitors.	Sales
Need a better way to track leads.	Sales and Marketing
Need a way to track marketing ROI.	Marketing
Unable to track forecasted revenue from all profit centers.	Management
Need to be able to identify top performers in every group.	Management

(Sample) My Pain Points

Pain Point	Group
Limited knowledge of the last time I spoke to someone — I end up repeating the same information.	Prospect
Didn’t follow up when promised.	Prospect

My Pain Points

Pain Point	Group

3. Capture and prioritize your goals, and define measurements

Define your goals in terms of the hoped-for solutions for each target group. Set the priority to help focus your Salesforce implementation efforts going forward. Think through the ways in which you would measure the achievement of these goals.

(Sample) My Business Goals and Priorities

Goal	Metric	Priority
What does your executive team hope to get out of Salesforce?		
Identify top performers	Reps with highest revenue closed	Important
Identify top customers	Top deals by revenue	Must Have
Capture leads from the website	[X]% increase in leads	Nice to Have
What do your managers hope to get out of Salesforce?		
Better visibility into the pipeline	100% of deals are shown in Salesforce	Important
Know why key deals are lost	Count by reason: Closed or Lost	Must Have
Increase close rates	Increase close rate by [X]%	Must Have
Relevant reports for top management	CRM pipeline reports	Must Have
Make sure leads are not dropped	Reduce dropped leads from [X] to [Y]	Important
What are the goals for your Salesforce end users?		
Easy access to collateral	Document consistency	Important
Able to work “on the go”	Increase effectiveness by [X]%	Must Have
Get credit for work	Reduced employee attrition	Important
What are the goals for your customers related to the Salesforce solution?		
Know the history of interactions	Higher customer satisfaction scores	Must Have
Use my time wisely	Increase close rate	Important

My Business Goals & Priorities

Goal	Metric	Priority
What does your executive team hope to get out of Salesforce?		
What do your managers hope to get out of Salesforce?		
What are the goals for your Salesforce end users?		
What are the goals for your customers related to the Salesforce solution?		

Define Your Success Metrics

Understand what you'll use to measure the success of your Salesforce implementation across usage and data quality, user satisfaction, and business performance.

1. Usage and data quality
2. User feedback
3. Business performance

1. Usage and data quality

(Sample) My Usage and Data Quality Measures

Key Questions	Metrics
Are users logging in?	Percentage of users logging into Salesforce
Are users using the application?	• Number of accounts, contacts, and opportunities created • Number of active licenses • Percentage of users running pipeline reports
Who is logging in most often?	• Login leaderboard • Hall of Fame
Are users interacting with the application?	Average number of opportunities associated to an account
Are opportunities up to date?	Number of open opportunities with close dates in the past

My Usage and Data Quality Measures

Key Questions	Metrics

2. User feedback

(Sample) My User Satisfaction Measures

User Survey Questions
Is the training helping you perform your job?
Have you improved lead qualification?
Do you find competitor information quickly?
Is collaboration helping to close deals faster?

My User Satisfaction Measures

User Survey Questions

3. Business performance

(Sample) My Business Performance Measures

Key Questions	Metrics
How is my team tracking with sales?	• Year-to-date (YTD) sales • Quarter-to-date (QTD) sales • Win ratio for current and previous year
Do I have a sufficient pipeline?	• New business pipeline • Pipeline by owner
What is the quality of my leads?	• Lead conversion rates • Lead conversion rates by source
Are we remaining engaged with our	Accounts with no activities for the last 90 days

(Sample) My Business Performance Measures

Key Questions	Metrics
customers?	

My Business Performance Measures

Key Questions	Metrics

Resources

Help & Training Resources:

- Successfully Implement with Salesforce.com Partners
- More help & training

Videos:

- Lightning Experience Video Series
- Getting Started: Navigating Salesforce
- Getting Started: Administering Salesforce

Trailhead Modules:

- End Users: Salesforce User Basics
- Administrators (above plus): Chatter Basics

Success Community:

Success Getting Started Group

STEP 2: Create the User Experience

Next, watch the Create video or attend the Create webinar. We'll show you how to adapt Salesforce to enable and improve your business processes by completing these core steps:

Define Your Sales Process

Define the steps you go through to close a deal (such as your sales funnel). Define the criteria that will be required before you move to the next stage.

(Sample) My Sales Stages

Stages	Enter this stage when ...
Lead	Individuals are received through a lead source, they are not current customers, and interest is not confirmed.
Prospecting	An individual is an existing customer with a new opportunity.
Qualification	An individual has been contacted and expressed interest.
Discovery or Scoping	Interactions to understand individual needs for a particular deal are in progress.
Proposal or Price Quote	A proposal or quote is being developed.
Negotiation or Review	An individual has a proposal and has not made a decision.
Closed or Won/Lost	An individual accepts or rejects a proposal.

My Sales Stages

Stages	Enter this stage when ...

Set Up Users

Key Considerations	Action	References
1. Set up your role hierarchy.		
Role Hierarchy What role hierarchy will ensure that your managers have access to the same data as their employees?	• Identify the roles you want to set up based on your organization's structure. • Create your role hierarchy and set up your roles.	**Video** Who Sees What: Data Visibility How-To Series
2. Enter your users.		
Salesforce Users What employees would benefit from access to Salesforce?	• Enter the names of your users. • Assign your users to roles and profiles.	**Trailhead** User Management

Set Up Leads

Key Considerations	Action	References
1. Adjust the standard fields to match your business.		
Lead Standard Fields What adjustments to standard fields would align Salesforce to my business process?	• Use the table below to define the adjustments that you'll need to make to standard fields. • Hide unnecessary fields and related lists. • Set required fields. • Update picklist values. • Set default values. • Use help text to guide users. • Premier+ Success Plan: Admin Services: Review the admin case templates	**Help Articles** • Guidelines for Creating Leads • Define Default Settings for Lead Creation • Lead Fields • Add or Edit Picklist Values **Best Practice (Advanced)** Improve Lead Conversion: Learn how to use data insights to capture, prioritize, and route leads

Key Considerations	Action	References
	to submit a case to: Create/Modify Fields	to the right resource at the right time.

Salesforce Standard Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	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			

Salesforce Standard Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
		• 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 • Telecommunica-tions • 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			

Salesforce Standard Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
		• Seminar Internal • Seminar Partner • Trade Show • Web • Word of Mouth • Other			
Open	Open	• Open • Contacted • Qualified • Unqualified			
Mobile	Phone				
Name	Name				
		• Mr. • Ms. • Mrs. • Dr. • Prof.			
First Name	Text (40)				
Last Name	Text (80)				
Number of Employees	Number (8,0)				
Phone	Phone				
Rating	Picklist	• Hot • Warm • Cold			
Title	Text (80)				
Website	URL (255)				

Key Considerations	Action	References
2. Add custom fields (if necessary).		

Lead Information
• What additional lead information do I need to track for reporting purposes?
• Do I need a more robust lead scoring approach?
	• Use the table below to define the custom fields you'll need to drive reporting and decisions. (Some commonly used fields are provided.)
	• Add custom fields.
	• Adjust the field location.
	• Create validation rules (as appropriate).
	• Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case to:
	  • Create/Modify Fields
	  • Validation Rule
		Help Articles
		• Define Validation Rules
		• Examples of Validation Rules
		
		AppExchange App
		Lead Scoring

Custom Field Name	Data Type (see Custom Field Types)	Values
Service or Product Interest	Picklist	
Other Lead Source	Text	

Key Considerations	Action	References
3. Determine your lead import approach and enter your leads.		
Manually Enter Leads Do you receive leads one at a time (such as from referrals	No setup required. Enter leads directly in Salesforce.	**Trailhead** Leads & Opportunities

Key Considerations	Action	References
or business cards)?		**Help Article** Guidelines for Creating Leads
(Optional) Import Leads Do you purchase lists and spreadsheets? If so:	Use the Data Import Wizard to import your leads.	**Help Article** Data Import Wizard
(Optional) Set Up Web-to-Lead Do you have leads generated from websites? If so:	Set up Web-to-Lead.	**Help Article** Generate Leads From Your Website for Your Sales Team
4. Assign your leads.		
Manual Lead Assignment Do you have a low volume of leads?	No setup is required. Enter single or bulk leads directly in Salesforce.	
(Optional) Lead Queues Do you distribute leads to a group of people for selection?	Create lead queues.	
(Optional) Lead Assignment Rules Do you use a process or set of rules to distribute leads (such as Regional, Industry, or Product)?	• Create lead assignment rules. • Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case for: Assignment Rules	
5. Create custom list views.		
Custom List View Are there particular fields that drive the action you want to perform (such as unassigned leads for ABC product interest)?	Create custom list view(s).	
6. Adapt dashboards and reports.		
Analytics	• Install Lead and Opportunity	

Key Considerations	Action	References
What metrics do you need to run your business? (Refer to the metrics you defined in Step 1: Prepare for Success.)	Management Dashboards from the AppExchange. • Modify reports and dashboards to align to your business. • Share reports and dashboards with appropriate users. • Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case for: Dashboard/Dashboard Component • Create a Report	
7. Create custom list views.		
Custom List View Are there particular fields that drive the action you want to perform (such as unassigned leads for ABC product interest)?	Create custom list view(s).	
8. Adapt dashboards and reports.		
Analytics What metrics do you need to run your business? (Refer to the metrics you defined in Step 1: Prepare for Success.)	• Install Lead and Opportunity Management Dashboards from the AppExchange. • Modify reports and dashboards to align to your business. • Share reports and dashboards with appropriate users. • Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case for: Dashboard/Dashboard Component • Create a Report	

Key Considerations	Action	References
1. Adjust the standard fields to match your business.		
Opportunity Standard Fields What adjustments to standard fields would align Salesforce to my business process?	• Use the table below to define the adjustments you'll need to make to standard fields. • Hide unnecessary fields and related lists. • Set required fields. • Customize standard field picklist values. • Use help text to guide users. • Set default values. • Define opportunity contact roles. • Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case to: Create/Modify Fields	**Help Articles** • Opportunity Fields • Add or Edit Picklist Values • Working with Forecast Categories • Viewing and Editing Contact Roles • Configure Salesforce with Custom Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	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	Pick list	• Advertisement • Employee Referral • External Referral • Partner • Public Relations • Seminar Internal • Seminar Partner • Trade Show • Web • Word of Mouth • Other			

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
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	**Recommendation:** Align stages to the sales process that you defined in the Define Your Sales Process section. • Prospecting • Qualification • Discovery/ Scoping • Proposal/Price Quote • Negotiation/ Review • Closed Won • Closed Lost		**Recommendation:** Add the definitions as help text that you defined in the Define Your Sales Process section.	
Type	Picklist	• Existing Business • New Business			

Opportunity, Stage, and Forecast Category Guidance (change as needed)

Stage	Probability	Forecast Category
Prospecting	10%	Pipeline
Qualification	20%	Pipeline
Discovery/Scoping	50%	Pipeline
Proposal/Price Quote	75%	Pipeline
Negotiation/Review	90%	Pipeline
Closed Won	100%	Closed
Closed Lost	0%	Omitted

Contact Role Standard Values (change as needed)

Standard Field Name (* = required)	Data Type	Pick list Values
Contact Role	Picklist	• Business User • Decision Maker • Economic Buyer • Economic Decision Maker • Evaluator • Executive Sponsor • Influencer • Technical Buyer

Key Considerations	Action	Resources
2. Add custom fields (if necessary)		

Opportunity Information
What additional opportunity information do I need to track for reporting purposes?
	• Use the table below to define the custom fields you'll need to drive reporting and decisions. (Some commonly used fields are provided.)
	• Add custom fields.
	• Adjust the field order.
	• Add validation rules.
	• Map lead conversion fields.
	• Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case to:
	  • Create/Modify Fields
	  • Validation Rule
		Help Article
		Custom Fields

Custom Field Name	Data Type (see Custom Field Types)	Values
Product Interest	Picklist	
Other Lead Source	Text	
Closed Lost Reason	Picklist	

Key Considerations	Action	Resources
3. Set up opportunity products.		
Opportunity products Do you want to report on product interest, sales trends, and product leads? Do you want to send quotes that include line item quotes? If so, you may want to use products and price books.	**If you are using products and price books:** • Adjust the opportunity product layout (as needed). • Enter your products manually or with the Data Loader. • Enter your standard price book (and others as necessary). **If you are not using products and price books:** Hide the products related list from the opportunity page.	**Help Articles** • Page Layouts Unique to Opportunity Products • Insert and Upload New Products and Price Books Via Data Loader
4. Create list views.		
Custom List Views Are there particular fields that drive the action you want to perform (such as opportunities past close date)?	Create custom list views.	**Help Article** Create a List View is Salesforce Lightning
5. Set up Sales Path.		
Sales Path Do you want to guide your users along steps in a process, like working an opportunity from stage 1 to close?	• Create a path to guide users on a process. • Select key fields to focus users on the most critical information, and at each step, help users succeed with step-specific guidance.	**Help Article** • Path - Overview • Set Up a Sales Path in • Lightning Experience: Walkthrough
6. Customize Highlights panel.		
Compact Layouts Do you want the ability to have key fields highlighted at the top of the screen?	Edit Compact Layouts to add fields to appear in an object's highlights area, like at the top of the Opportunity page.	**Help Article** • Compact Layouts • Create Compact Layouts

Key Considerations	Action	Resources
7. Create reports and dashboards.		

Analytics
What metrics do you need to run your business? (Refer to the metrics you defined in Step 1: Prepare for Success.)
	• Install Lead and Opportunity Management Dashboards from the AppExchange.
	• Modify reports and dashboards based on your requirements.
	• Share reports and dashboards with other users.
	• Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case for:
	  ◦ Dashboard/Dashboard Component
	  ◦ Create a Report
		AppExchange App
		Lead and Opportunity Management Dashboards
		
		Help Article
		Modify a Dashboard Component
		
		Best Practice
		Analyze Data Using Reports and Dashboards

Set Up Activities

Key Considerations	Action	Resources
1. Adjust the standard fields to match your business.		
Activity Standard Fields What adjustments to standard fields would align Salesforce to my business process?	• Use the table below to define the adjustments you want to make to standard fields. • Remove unnecessary fields. • Change field locations. • Set required fields. • Update picklist values. **Note:** Activity Type defaults are hidden from users. We recommend that you update your profile visibility, add a field to the Activity page layout, and adjust your picklist values as needed. • Set default values. • Use help text to guide users.	**Help Articles** • Activities • Task Fields • Event Fields • Add or Edit Picklist Values

Key Considerations	Action	Resources
	• Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case to: Create/Modify Fields	

Task Standard Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
Assigned To*	Lookup (User, Calendar)				
Call Duration	Number (8, 0)				
Call Object Identifier	Text (255)				
Call Result	Text (255)				
Call Type	Picklist				
Comments	Long Text Area (32000)				
Create a Recurring Series of Tasks	Picklist				
Created By	Lookup (User)				
Due Date	Date/Time				
Email	Email				
Last Modified	Lookup				

Task Standard Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
By*	(User)				
Name*	Lookup (Contact, Lead)				
Phone	Phone				
Priority*	Picklist	• High • Normal			
Related To	Lookup				
Send Notification Email	Checkbox				
Status*	Picklist	• Not Started • Completed • Waiting on Someone Else • Deferred			
Subject*	Picklist	• Call • Email • Meeting • Send Letter/ Quote • Other			
Type	Picklist	• Administrative • Call • Meeting • Presentation • Other • Email			

Event Standard Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
All-Day Event	Checkbox				
Assigned To*	Lookup (User, Calendar)				
Created By	Lookup (User)				
Date	Date/Time				
Description	Long Text Area (32000)				
Duration	Number (8, 0)				
Email	Email				
End*	Date/Time				
Last Modified By	Lookup (User)				
Name	Lookup (Contact, Lead)				
Location	Text (255)				
Phone	Phone				
Private	Checkbox				
Related To	Lookup				
Show Time	Picklist				

Event Standard Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
As					
Start*	Date/Time				
Subject*	Picklist	• Call • Email • Meeting • Send Letter/ Quote • Other			
Time	Date/Time				
Type	Picklist	• Administrative • Call • Meeting • Presentation • Other • Email			

Key Considerations	Action	Resources
2. Set up email integration.		
Email Integration Do I need to synchronize Salesforce with my email provider? If so:	• Use the table below to define the records you want to sync and direct. (Our recommendations are included.) • Complete integration setup.	**Help Articles** • Install and Set Up Salesforce for Outlook • How Does Email to Salesforce Work? • Gmail™ in Salesforce

Email Integration Specifications

Item	Sync	Direction
Email	Yes	Email provider to Salesforce
Tasks	Yes	Two-way
Events	Yes	Two-way
Contacts	No	None

Key Considerations	Action	Resources
3. Create list views.		
Custom List Views Are there particular fields that drive the action you want to perform (such as tasks due this week)?	Create list views to see a specific set of records.	**Help Article** • List Views • Create a List View
4. Create reports and dashboards.		

Analytics
What metrics do you need to run your business? (Refer to the metrics you defined in Step 1: Prepare for Success.)
	• Modify reports and dashboards based on your requirements.
	• Set up new reports and dashboards and/or install free AppExchange reports.
	• Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case:
	  • Dashboard/Dashboard Component
	  • Create a Report
		Help Article
		Modify a Dashboard Component
		
		Best Practice
		Analyze Data Using Reports and Dashboards
		
		AppExchange
		Sales Activity Dashboard

Utilize Chatter

Key Considerations	Action	Resources
Opportunity Collaboration How do your sales teams collaborate on deals?	Collaborate on opportunities.	**Best Practice** Getting Started with Chatter

Chatter Groups
What kinds of groups will foster collaboration and help run your business?
	• Create Chatter groups.
	• **Recommended groups:**
	  ◦ Salesforce Training, Tips and Support
	  ◦ Company initiative or event
		Help Article
		Create Chatter Groups

Download and Leverage the Salesforce1 Mobile App

Download and Leverage the Salesforce1 Mobile App

Key Considerations	Action	Resources

Download and Leverage the Salesforce1 Mobile App
How do you enable the Salesforce1 Mobile App to view and edit data on your mobile device?
	• Have users download the Salesforce1 Mobile App from the App Store or Google Play.
	• **Common ways to use the Salesforce1 Mobile App:**
	  ◦ View, modify, and create contacts, accounts, opportunities, and tasks.
	  ◦ Collaborate with Chatter.
	  ◦ View reports and dashboards.
	  ◦ Use the Today App.
		Best Practice
		Getting Started with the Salesforce1 Mobile App

(Optional) Customize the Salesforce1 Mobile App What additional setup	• Branding • Page layouts • Navigation menu	**Best Practice** Getting Started with the Salesforce1 Mobile App

Download and Leverage the Salesforce1 Mobile App

Key Considerations	Action	Resources
can improve the Salesforce1 Mobile App experience?	• Notifications • Publisher actions	

Set Up Accounts

Key Considerations	Action	Resources
1. Adjust the standard fields to match your business.		
Account Standard Fields What adjustments to standard fields would align Salesforce to my business process?	• Use the table below to define the adjustments you'll need to make to standard fields. • Hide unnecessary fields and related lists. • Set required fields. • Customize standard field picklist values. • Set default values. • Use help text to guide users. • Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case to: Create/Modify Fields	**Help Articles** • Accounts • Add or Edit Picklist Values

Task Standard Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	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			

Task Standard Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
		• 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				

Task Standard Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
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)				

Key Considerations	Action	Resources
2. Add custom fields (if needed).		
Account Information What additional account information do I need to track for reporting purposes?	• Use the table below to define the custom fields you'll need to drive reporting and decisions. (Some commonly used fields are provided.) • Add custom fields. • Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case to: Create/Modify Fields	**Help Article** Custom Fields

Custom Field Name	Data Type (see Custom Field Types)	Values

Key Considerations	Action	Resources
3. Create an account hierarchy (if needed).		
Account Hierarchy Do you track multiple locations, franchises, and subsidiaries on an account? If so:	• Create an account hierarchy by associating an existing and/or new account to a parent account. • If loading accounts, include a column with the parent account ID and map that to the Parent Account field in Salesforce.	**Help Article** Account Settings
4. Create custom list views.		
Account Views Are there particular fields that drive the action you want to perform (such as Customer Accounts or Competitor Accounts)?	Create custom list views to display records that meet your own criteria for quick and easy access.	**Help Article** • List Views • Create a List View

Set Up Contacts

Key Considerations	Action	Resources
1. Adjust the standard fields to match your business.		
Contact Standard Fields What adjustments to standard fields would align Salesforce to my business process?	• Use the table below to define the adjustments you need to make to standard fields. • Hide unnecessary fields and related lists. • Set required fields. • Set default values. • Use help text to guide users. • Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case to: Create/Modify Fields	**Help Articles** • Contacts Overview • Add or Edit Picklist Values **Premier Training** Configure Salesforce with Custom Fields

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	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)				

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
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			

Standard Field Name (* = required)	Data Type	Picklist Values	Default Value	Help Text	Want Field?
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)				

Key Considerations	Action	Resources
2. Add custom fields (if needed).		
Contact Information What additional account information do I need to track for reporting purposes?	• Use the table below to define the custom fields you need to drive reporting and decisions. (Some commonly used fields are provided.) • Add custom fields. • Adjust field locations on the page layout. • Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case to: Create/Modify Fields	**Help Article** Custom Fields

Custom Field Name	Data Type (see Custom Field Types)	Values
Level/Role	Picklist	• CEO • VP • Director • Assistant • Other
Active	Picklist	• Active (default) • Not Active

Align Salesforce to Your Business

Key Considerations	Action	Resources
Brand the Home Page (Salesforce Classic only) Do you want to further align Salesforce to your business and improve the user experience?	• Add your logo. • Set up custom links. • Add a message section. • Display your favorite dashboard.	**Help Article** Design Home Page Layouts
Clear the Clutter (Salesforce Classic only) Are you displaying more tabs than what you'll actually use?	Remove any tabs that won't be used.	**Help Article** Editing App Properties
Improve Usability With Page Layouts Now that you've added your custom fields, can you further organize the page to align the field order to your process?	• Create new sections with meaningful section headers. • Customize related lists (such as fields shown or order). • Premier+ Success Plan Admin Services: Review the admin case templates to submit a case for: Page Layout Create/Change	**Help Article** Customize Page Layouts with the Enhanced Page Layout Editor
Improve Usability With Search Modification Are there more fields that can help users find the data they need?	• Add more fields to make it easier to use lookup fields. • Make sure that relevant fields are returned in search.	**Help Articles** • Specify Lookup Search Filter Fields (Salesforce Classic only) • Customize Search Layouts

STEP 3: Enable the User Experience With Data

Watch the Enable video or attend the Enable webinar to improve your users' confidence in Salesforce. Learn how to achieve business results by migrating and maintaining data using the following steps:

Identify Data and Prepare Your Data for Import

<table>
<tr><th>Key Considerations</th><th>Action</th><th>Resources</th></tr>
<tr><td>Data Analysis
What data is appropriate to migrate to Salesforce? What are the sources of my data?</td><td>Determine the data for import and its source. (Consider objects that are relevant and clean as well as the length of time you want to cover.)</td><td>Best Practice
Manage Data Effectively
See Import Data</td></tr>
<tr><td>Data Preparation
How clean is my data? Are there duplicate names, companies, and so on that I need to merge?</td><td>To create your data import template, export field name columns from Salesforce. (There’s no need to change column headers if you’re using ACT, Outlook, GoldMine, or Palm Desktop.)
Include the record owner ID.
Populate required fields.
Use valid picklist values (such as Not Started, In Review, and Complete).
Examine data and correct errors:
Delete duplicates.
Correct spelling.
Enforce standards.
Fill in incomplete fields.
(Optional)
Include an import batch.
Add Created By and Created Date fields. (To do this, you’ll need to open a case with Salesforce.)
Include legacy system data ID.</td><td>Best Practice
Manage Data Effectively
See Import Data

Help Articles
Preparing Your Data for Import
Create Export Files for Import Wizards
How do I use an External ID to import related records?</td></tr>
<tr><td>Salesforce Preparation
Does Salesforce align to my data to allow for data migration?</td><td>Identify required fields.
Create custom fields.
Add picklist values.
Add a field or legacy system data ID.
Open “audit fields” such as Created Date to import true values.
Create a batch field to identify each import.</td><td>Help Article
Add or Edit Picklist Values</td></tr>
</table>

Import Data

Key Considerations	Action	Resources
Data Import Wizard What is the best approach to load my data?	• Choose data to import. • Edit field mapping. • Test on subsets of records before a full import. • Review and start import. • Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case to: Create/Update/Delete Data	**Best Practice** Manage Data Effectively See Import Data **Help Article** Choosing a Method for Importing Data

Manage Your Data

Key Considerations	Action	Resources
Educate on Data Quality What standards should I have in place to maintain my data?	• Use naming conventions. • Use address conventions. • Prevent duplicates.	
Set Up Data Quality in Salesforce How can I set up Salesforce to help with data compliance?	• Establish required fields. • Create default values. • Use data validation rules.	**Help Articles** • Define Validation Rules • Examples of Validation Rules
Data Archive Strategy How should I store the data that I'm not migrating to Salesforce? What data should I archive and how often?	• Determine an archive strategy for data you do not migrate. • Determine an ongoing archive strategy for data.	

<table>
<tr><th>Key Considerations</th><th>Action</th><th>Resources</th></tr>
<tr><td>Create Data Quality Dashboards
How can I monitor data quality and take action?</td><td>Install Data Quality Analysis Dashboards from the AppExchange.
Modify reports and dashboards to align to your business.
Share the reports and dashboards with appropriate users.
Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case for:
Dashboard/Dashboard Component
Create a Report</td><td>Best Practice
Analyze Data Using Reports and Dashboards

Help Article
Modify a Dashboard Component

AppExchange App
Data Quality Analysis Dashboards</td></tr>
<tr><td>Back Up Data
How will I back up my Salesforce data to protect from internal mistakes?</td><td>Options include:
Weekly Data Export Service
Included with Enterprise Edition and above.
Available for a fee for Professional Edition customers.
Explore the AppExchange for options available for data backup.</td><td>Best Practice
Manage Data Effectively
Data Export and Recovery</td></tr>
</table>

STEP 4: Deploy and Empower Your Users

Watch the Deploy video or attend the Deploy webinar to learn how to engage with your users and take action to achieve your goals through the following steps:

1. Identify your audience

Determine the audience groups that need to be trained and what scenarios are covered by Salesforce. Then map the processes that are relevant to each audience.

(Sample) Audience Identification

Training Area	Sales Reps (10)	Sales Managers (2)	Executive (1)
Salesforce Basics	X	X	X
Lead Process	X	X	
Sales Process	X	X	
Activity Tracking	X		
Account and Contact Management	X		
Reports and Dashboards	X	X	X

Audience Identification

Training Area	Audience 1 (#)	Audience 2 (#)	Audience 3 (#)

2. Determine relevant scenarios

Think about the typical Salesforce processes that your users will go through on a daily basis. Plan your training around these processes and document both the scenario and the Salesforce functions that you'll cover.

(Sample) Sales Rep Training Scenario

Scenario	Functionality
1. Run weekly sales meetings with the pipeline report. 2. Review teams' completed and scheduled activities. 3. Meet with sales rep to review pipeline, activity, and lead conversions. 4. Review the status of the top 10 opportunities for the current month. 5. View selected key opportunities to understand the pending steps for close. 6. Use mobile device to check on monthly sales targets and collaborates with sales reps on opportunities.	• **Reports & Dashboards:** View and drill down on opportunity, activity, and lead reports. • **Sales Process:** Sales stages, update opportunities, contact roles, and products. • **Lead Process:** Lead status and conversion. • **Activity Tracking:** Create and update activities. • **Chatter:** Post on opportunity and account records. • **The Salesforce1 Mobile App:** Today, Dashboards, Post, Opportunities, Collaboration.

(Sample) Sales Rep Training Scenario

Scenario	Functionality
1. Contact leads to determine if they are ideal prospects and converts. 2. Review account, opportunity, and activity details before speaking with customer. 3. After customer meetings: Update opportunity sales stages and create an activity for follow-up. 4. View the Opportunity Management dashboard to prepare for meeting with manager. 5. Use mobile device to view open tasks for the day.	• **Reports & Dashboards:** View and drill down on opportunities. • **Lead Process:** Convert leads and update lead statuses. • **Sales Process:** Sales stages, update Opportunities, contact roles and products. • **Activity Tracking:** Create and update activities. • **Chatter:** Post on opportunity and account records. • **The Salesforce1 Mobile App:** Today, Dashboards, Post, Opportunities. Collaboration.

Sales Rep Training Scenario

Scenario	Functionality
1.	•

Note: We recommend that Premier customers leverage Premier Success Customizable End User Training.

3. Define your training paths

Training paths are the sequence of training and type of training that you want for your users. This can vary by type of audience (such as a sales rep or an executive).

(Sample) Training Plan

Prerequisite Training	Scenario Training	Post-Go-Live
Basic Salesforce Training (Self-Paced) • Getting Started: Navigating Salesforce • Analyze Data Using Reports & Dashboards • Chatter Basics	**Scenario-Based Training (In Person)** • Sales rep scenarios (above) • Sales manager scenarios (above)	**Refresher and Advanced Topics (web-based)** • Top tips based on questions • How to use reports and dashboards • Custom list views

Training Plan

Prerequisite Training	Scenario Training	Post-Go-Live
•	•	•

Drive user adoption

Key Considerations	Action	Resources
Motivate How will you encourage users to leverage Salesforce?	• Leverage executive leadership. • Emphasize the value. • Motivate by recognition. • Develop incentives.	
Support How will you support users if they have questions about Salesforce?	• Utilize super users. • Document your support process and share. • Address problems quickly and publicly. • Offer refresher training.	**Help Article** Defining Validation Rules
Engage How will you connect with your users and understand	• Develop a communication plan.	**Best Practice** Getting Started with Chatter

Key Considerations	Action	Resources
their feedback about Salesforce?	• Create feedback loops. • Reach out to "resistors." • Utilize Chatter. • "Walk the floor."	**Help Article** Create Chatter Group

Track and Measure Success

Key Considerations	Action	Resources

Measure Salesforce usage
How will you know if users are leveraging Salesforce? What actions will you take based on your observations?
	• Modify reports and dashboards based on your requirements.
	• Set up new reports and dashboards and/or install free Salesforce Adoption Dashboards.
	• Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case for:
	  ◦ Dashboard/Dashboard Component
	  ◦ Create a Report
		Help Articles
		• Adoption Dashboard AppExchange
		• Modify a Dashboard
		
		Best Practice
		Analyze Data Using Reports and Dashboards

Measure Data Quality
How will you keep your data up to date and validate that users are using Salesforce appropriately?
	• Modify reports and dashboards based on your requirements.
	• Set up new reports and dashboards and/or install free Data Quality Analysis Dashboards.
	• Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case for:
	  ◦ Dashboard/Dashboard Component
	  ◦ Create a Report
		Help Articles
		• Data Quality Analysis Dashboards
		• Modify a Dashboard
		
		Best Practice
		Analyze Data Using Reports and Dashboards

Assess User Satisfaction How will you determine	• Use Chatter polls. • Distribute surveys and explore the survey tools on AppExchange.	**Help Articles** • **Polls** • AppExchange: Survey

Key Considerations	Action	Resources
if pain points are being addressed and if Salesforce is helping users reach their goals?		tools

Track Achievement of Business Outcomes

Key Considerations	Action	Resources

Success Metrics
Are all the metrics defined in Step 1: Prepare for Success reflected in the reports and dashboards?
	• Review the metrics defined in Step 1: Prepare for Success (Usage and Data Quality, User Satisfaction, Business Performance).
	• Add or modify reports and dashboards to access relevant metrics to manage your business and take action.
	• Install adoption dashboards to track Salesforce usage.
	• Premier+ Success Plan: Admin Services: Review the admin case templates to submit a case for:
	  • Dashboard/Dashboard Component
	  • Create a Report
		Help Article
		Modify a Dashboard Component
		
		Best Practices
		Analyze Data Using Reports and Dashboards
		See sample CRM dashboards.

Continue the Momentum

Build on your Getting Started success. Visit the Success Journey Hub to access best practices to help you tap into the full power of Salesforce and deliver on your key business priorities.