Best Practices for Implementing Salesforce CRM

With cloud-based computing and a multi-tenant architecture, infrastructure concerns are a thing of the past. As a result, Salesforce CRM implementations—and ongoing maintenance—are easier and less time-consuming than traditional enterprise implmentations. The best practices below provide resources to help your implementation go smoothly.

Step-by-step guides
- Getting Started with Salesforce CRM
- Getting Started workbook

Implementation overview
- Meet—and beat—these 8 CRM challenges
- 5 steps to a successful implementation
- Achieving outstanding CRM administration
- Get these must-have administrator tools
- Using data access design patterns
- Managing your Salesforce CRM storage
- 3 tips to get unstuck when creating a formula

Extend Salesforce CRM
- Choose the right tools to customize and extend Salesforce CRM
- 4 questions to answer for a successful portal implementation
- Create powerful Web sites on Force.com
- 5 steps to using the content library
- 8 keys to mobile CRM success
- 3 steps to managing members and donations with Salesforce CRM
- Bring cloud computing to your entire company with the AppExchange

Drive user adoption
- 6 steps toward top data quality
- Tips for using incentives an d rewards to boost adoption
- Beyond login rates: three key areas for measuring adoption
- 10 tips for a successful training plan
- How to develop a comprehensive training strategy
- 9 steps to effective change management
- 5 simple steps to reports and dashboards

Salesforce CRM
Getting Started Guide

Contents

Introduction

This guide takes you through the steps of getting up and running with Salesforce CRM. Along the way, you'll find checklists and links to resources such as training segments, Best Practice documents, and tip sheets. Also be sure to take advantage of the associated workbook, which will help you to come up with and track important decisions.

Section 1: Plan and Prepare

One of the best investments you can make in your Salesforce CRM success is to have a clear plan. Just like you wouldn't build a house without a blueprint, you don't want to start with Salesforce CRM without a plan. A plan will help you to communicate with everyone, to do things in the right order, identify key resources, and know when you're done.

As you plan and prepare to get Salesforce CRM up and running, complete the following steps (in order):

1. Build your team
2. Define and prioritize your goals
3. Define your process
4. Map your process to Salesforce CRM functionality
5. Define the fields you need
6. Define the reports you need
7. Train your administrator
8. Communicate with your users

To help jumpstart your implementation, you can use the worksheets in the Getting Started Workbook to come up with and document your decisions. Download this document and treat it as a work in progress that you return to as you complete the steps in this guide.

Build your team

To a small business with limited resources, the term "project team" may sound intimidating. It doesn't have to be—just make sure you cover the following roles:

- An executive sponsor

- Someone to get the application up and running

- Someone to manage Salesforce CRM day to day

- A power user who really knows your company's business processes

The **executive sponsor** lends influence to the project by becoming its champion. Having that person's full support and participation—from the planning stage until the go-live date and beyond—is absolutely critical.

The person who's the designated **administrator** usually gets Salesforce CRM up and running and then manages it day to day. A technical background isn't necessary, but it may be helpful.

And to make sure you meet the needs of your end users, it is essential to involve key **power users** in the planning process.

Get a good administrator

System administration with cloud computing is much easier than with traditional software. Setting up, customizing the application, maintaining it, training users, and "turning on" the new features that become available with each release—it's all just a few clicks away.

The administrator is one of the most important roles when it comes to success, even though it is not necessarily a full-time position. In the initial stages of your project, the role will require more concentrated time (approx 50%). After go live, managing Salesforce CRM day to day will require much less time (approx 10–25%).

Find the right person for the job and continue to invest in that person's professional development. Here are some qualities to look for in an administrator:

- A solid understanding of your business processes

- Knowledge of the organizational structure and culture to help build relationships with key groups

- Excellent communication, motivational, and presentation skills

- The desire to be the voice of the user in communicating with management

- Analytical skills to translate requested changes into customizations

Document your key players

❗ It's time to pick your team. Go to the Getting Started Workbook and fill in the Your Project Team worksheet to track the people who'll play key roles.

Set your goals

In addition to a clear destination, it helps to break down the journey into manageable steps.

Setting your goals includes three key steps:

1. Define the company's vision
2. Define the goals that support this vision
3. Prioritize and document your requirements

Define the company's vision

Every successful CRM project starts with a clear vision of where you want to be as a result of the project. It's essential that your key executives are involved in defining this vision, that you document the vision, and that it is understood by everyone.

❗ Go to the Getting Started Workbook to review sample vision statements. Then come up with and record *your* vision in the Your Vision Statement worksheet. This statement should be a key component of future communication with your users.

Define goals for each group

Next, decide which concrete goals support your vision. Keep in mind that different groups are likely to have different goals. For example:

- Executives want to improve sales and track top performers or customer issues

- Sales managers want better visibility into their pipelines and reports that summarize key information

- Sales reps want to get the sales materials they need and cut down on administrative work

- Salesforce CRM provides various reports to help measure whether you've reached your goals.

❗ Go to the Getting Started Workbook and complete the Your Business Goals worksheet.

Prioritize and document your requirements

Most people—and most organizations—want to take on more than they can handle at any one time. Clearly defining and then prioritizing your goal will make it easier to decide what to put off, should that become necessary. And having some early "wins" is essential: when people see the value of Salesforce CRM first hand, they're more likely to support adding additional features.

❗ Go to the Getting Started Workbook and complete the Your Business Priorities worksheet.

Define your process

To define your process, it's important to first understand key Salesforce CRM terms. You'll also want to clarify what happens at each step—what inputs are needed, who does what, and how to measure the results.

Salesforce.com provides resources to help you define your process, including a Business Process worksheet for defining key aspects of that process.

Salesforce CRM terminology

Here are the basic Salesforce CRM terms you'll need to know:

- **Leads** – A lead is anyone who may be interested in your products or services; for example, someone you met at a conference or who filled out a Web form.

- **Opportunities** – An opportunity is a possible deal you want to track. By adding an opportunity, you build a "pipeline" you can use for forecasting.

- **Accounts** – An account is an organization, individual, or company that you want to track. An account can include customers, competitors, and/or partners and stores information such as names, addresses, and telephone numbers.

- **Contacts** – Contacts are the individuals associated with the accounts you're tracking. For each contact, you can store information such as phone numbers, titles, and roles in a deal.

What's a typical process?

For most businesses, defining a basic sales process includes gathering the following information:

- **Generating leads** – Where do leads come from? How do they get into Salesforce CRM? What happens next? What information do you want to measure about leads?

- **Optimizing lead flow** – How do you manage open leads? How do you check for duplicates? How do you work through leads? How do you measure conversion and top performers?

- **Closing deals** – How do you manage the sales funnel? How do you bring new customers into Salesforce CRM? How can you measure top deals, closed business by the month, and month-to-date trending?

Create your process overview

The goal of this step is to come up with a visual overview of your process. You can use salesforce.com's default processes to stimulate discussion. Because everyone uses the Opportunity process for turning leads into customers, it's a good place to start.

❗ Go to the Getting Started Workbook, complete the Business Process worksheet, and use it as input for the next step.

❗ Go to Administration Essentials: Customization: Creating a Business Process

A sample Sales process looks like this:
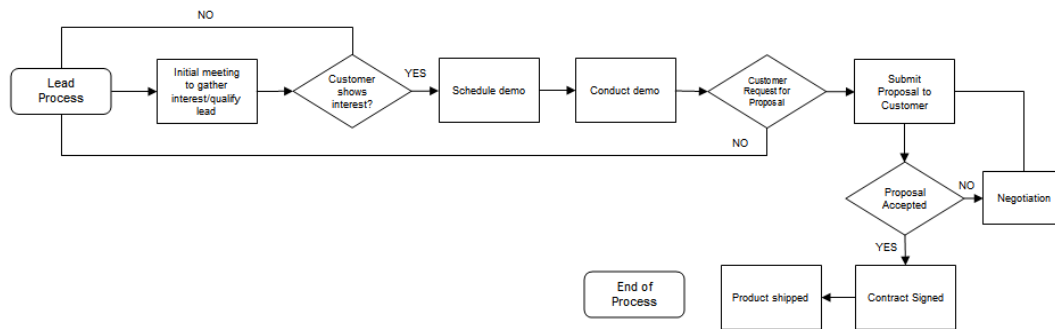
Discuss the sample process with the project team and modify it to fit your organization. For example, if you don't work with partners, remove that step from the sample process.

- Start at the point where a lead is qualified as an opportunity.

- On a whiteboard, draw each step as you ideally want the information to flow.

Map your process to Salesforce CRM

The next step is to map *your* ideal process to Salesforce CRM. In particular, pay attention to the names you give to your data elements and the fields in Salesforce CRM. For example, you may call a customer "Company," while the corresponding field in Salesforce CRM is "Account."

To start the mapping process, review the fields associated with the Opportunity process—which includes the fields for Leads, Accounts, Contacts, and Opportunities—and answer the following questions:

- Do you need all the fields? Review the fields and decide which can be removed.

- Do you need to rename standard fields so they make more sense; for example, to change "Company" to "Account"?

- Do you need new fields that are unique to your business?

❗ Go to the Getting Started Workbook and review the worksheets related to the Leads, Accounts, Contacts, and Opportunities fields. Use them to track the mapping of fields.

Decide which reports you need

Thinking about what information you want to capture and pull out of the system is a critical step before you begin customizing the application. The system is only as good as the information you can report from it.

Decide which reports you need to generate based on the goals you defined earlier. Salesforce.com provides dozens of standard reports. Here are a few of the most commonly used reports:

- **Active Accounts** – See current accounts

- **Account Owners** – See who owns what accounts

- **Lead Lifetime** – Track the life of a lead from creation to closure

- **Leads by Source** – Find out the most- and least-effective lead sources

- **Opportunity Pipeline** – See upcoming opportunities, in the current stage

- **Stuck Opportunities** – See which opportunities are not moving forward.

- **Closed Opportunities** – See won opportunities

- **Quarterly Forecast Summary** – See commit amounts, best-case amounts, and pipeline by quarter

- **Contact Role Report** – See contacts involved in current deals

You can modify these standard reports or create your own from scratch.

❗ Go to the Getting Started Workbook and revisit your goals. Determine whether the standard reports are sufficient or if you need to build custom reports.

Train the administrator
Investing in your administrator is a great way to ensure success.

Salesforce.com offers both self-paced training and classroom training. The self-paced training classes are available with your licenses around the clock, at no charge.

❗ The administrator needs to complete the following, launch the following free courses from the Online Courses list:

- Getting Started with Salesforce CRM Sales

- Administration Basics: Setting Up Salesforce CRM

In addition, the 4-day classroom course Administration Essentials is available at cities across the country.

Depending on your implementation, you may want to consider getting help with more technical aspects, such as data migration. For more information, contact Salesforce.com Consulting.

Notify the end users
With clear goals set, you can now engage your users. Sooner is better for user adoption. And user adoption is critical for success.

You don't want Salesforce CRM to come as a surprise to users. Instead, start building enthusiasm and keep your users updated as your go-live date approaches. For the highest impact, these communications should come from your executive sponsor. Here are some approaches that have worked for other customers:

- Build anticipation by enlisting the help of your marketing staff in treating the Salesforce CRM implementation like a product launch.

- Focus on two or three aspects of Salesforce CRM that will make your users' lives easier.

- Reach out to users who seem particularly enthusiastic and give them a role in helping other users once you're "live."

- Sponsor contests and offer incentives to help build excitement.

One of the best ways to get people on board is to get them involved. Give them a voice and be sure to listen. Make changes based on their feedback and communicate the difference their input made on the project's launch.

Summary and checklist: plan and prepare
Careful preparation and planning will help make the remaining steps in implementing Salesforce CRM go smoothly.

At this point, you've learned about the following tasks and documented your decisions in the Getting Started Workbook.

Progress checklist
- ❑ Identify key team members
- ❑ Define your CRM vision
- ❑ Define your business goals and priorities

❑ Define your reporting needs

❑ Create a diagram of your main processes

❑ Map your processes to Salesforce CRM

❑ Train your administrator

❑ Notify and engage end users

Resource summary

- Your Project Team worksheet

- Your Vision Statement worksheet

- Your Business Goals worksheet

- Your Business Process worksheet

- Your Reports worksheet

- Links to free training

- [Getting Started with Salesforce CRM Sales](#)

- [Administration Basics: Setting Up Salesforce CRM](#)

Section 2: Set up Salesforce CRM

This section helps you take the next steps by setting up your basic company information in Salesforce CRM. These settings include:

- **Company Profile** – Verifies your date display, language, and fiscal year definition

- **User Profiles** – Assigns a set of permissions to particular users

- **Organization-Wide Settings** – Defines basic access permissions on the file level

- **Role Hierarchy** – Defines how data rolls up in reports and which roles can see and report on the data of other roles

❗ To prepare for these tasks, please complete the [Administration Basics: Setting Up Salesforce CRM](#) training segment.

Set up your company profile

The company profile defines basic settings related to time zones, language, and how the fiscal year is defined. You can leave the default settings as is; however, it's important to know where to find and change this information, if necessary.

- **Company Profile** – These settings use your locale for setting local time, your default language, and the default currency.

- **Fiscal Years** – The fiscal year definitions are used in reporting, opportunities, and forecasting. The default fiscal year setting is a 12-month calendar year, with the first day of the fiscal year starting on any first day of the month. However, you can choose custom fiscal year periods.

Understanding profiles

A profile is a collection of settings and permissions that defines how users with a particular profile access records, how they see their data, and what they can do in the application. For Group and Professional Edition, you can use the standard Salesforce profiles but you can't create custom profiles. Still, it's important to understand profiles and how they work together with the organization-wide defaults and the role hierarchy.

The most important profiles include:

- **System Administrator** – Can configure and customize the application

- **Standard User** – Can run reports and create and edit records

- **Read Only** – Can run and export reports and view—but not edit—records

When you add users as you prepare to go live, you will assign one of these profiles to each user.

Define the organization-wide defaults

These settings determine the default level of data access for different types of information:

- **Private** – Users can access (view and edit) their information and that of those below them in the role hierarchy.

- **Public Read Only** – Users can view all data, but can edit only their information as well as that of those below them in the role hierarchy.

- **Public Read Write** – Users can view and edit all data.

For smaller organizations, we recommend granting at least Public Read Only access to create a collaborative working environment.

Examples

To allow all users to see everyone's Accounts, but not everyone's Opportunities, set access for Account records to Public Read Only and for Opportunities records to Private.

To allow the operations team to calculate commissions, they need to see Opportunities. However, you don't want them to edit the Opportunities. To allow read-only access, set Opportunities records to **Public Read Only**.

Define the role hierarchy

The role hierarchy looks similar to an org chart, but it has a different purpose. Because the role hierarchy is based on who needs to work with what data to their job, role hierarchies usually have fewer layers and the people at the top are not necessarily those at the top of the org chart.

The person in the top role has full access (view and edit) to his or her data, as well as the data of anyone lower in the hierarchy. Two common ways to set up a role hierarchy are by region or by product.

Note that, if there is a conflict, the role hierarchy overrides the settings in the organization-wide defaults.

There are three basic steps to setting up a successful role hierarchy:

1. Define the basic roles, such as sales representative, director of sales, and CEO. It's not necessary to create individual roles for each title; the idea is to simply define a hierarchy that gives users in higher-level roles access to the information entered by users in lower-level roles.

2. Build the role hierarchy based on how information should roll up for reporting and on who should see what data.

3. Assign individual users to the roles.

Example

In this sample hierarchy, data access works like this:

- The CEO/CFO roles have complete access (view, edit, and report) to all data in the organization.

- The regional directors (Western, Eastern, and International) have access (view and edit) to their data and to the data of the sales reps below them. They do not have access to each others' data.

- The users at the lowest level have access (view, edit, and report) only to their data.

Summary and checklist: set up Salesforce CRM

In this section, you learned how to define the basic Salesforce CRM settings for your company. At this point, you should:

Progress Checklist

- ❑ Know how to set your company profile
- ❑ Know how to set the fiscal year

❑ Define user profiles

❑ Define organization-wide defaults for basic data access

❑ Define role hierarchy to determine who has access to data

Resource Summary

- [Administration Basics: Setting Up Salesforce CRM](#)

Section 3: Make Salesforce CRM Your Own

When you sign on with Salesforce CRM, it's ready to use as is. But you can also easily modify (customize) Salesforce CRM so it's a good fit for your business and your users. In fact, the more you customize the application to fit your users, the more comfortable they will be and the more they'll use it. For that reason, customization can do great things to boost your adoption rates.

In this section, you'll learn about customization and get links to step-by-step procedures for making Salesforce CRM your own.

- Customization tips and tricks
- What can you customize?
  - Fields
  - Page layouts
  - Reports
- Should you use leads?
- Capturing leads from your Web site

Customization tips & tricks

Customizing Salesforce CRM is so easy that people tend to create lots of fields that end up not being used. For that reason, it's important to take a step back before you dive in. Here are the top five things to think about before starting to customize:

1. **Think before you build** – Start with the end in mind by knowing your end goal. Think about what information you want to pull out of the system and then make sure you have the fields to match. At the end of the day, Salesforce CRM is only as good as what's in your reports.

2. **Ask for input** – Talk to your users to find out what's critical for them to know. Then capture that information to run your business.

3. **Seed and grow** – Start with the basic fields you need and then identify new fields that could make your business run even better. This approach ensures you don't turn off your users.

4. **Run reports** – Run reports about 1 month after you go live to find out which fields are not being used. Use the opportunity to survey users about what could be improved.

5. **Make changes on the fly** – In response to feedback, make changes immediately to gain instant credibility. Make sure you communicate any changes because users don't like it when anything that affects their work happens "magically."

What can you customize?

You can customize many different Salesforce CRM components; however, most customers customize three things:

- Fields
- Page layouts
- Reports

Customizing fields

Because fields hold the data you want to capture and report on, it's important to make sure you have fields for important data elements and that those fields have names that make sense to your users.

Here are common approaches to customizing fields:

- **Modify the standard Salesforce CRM fields.** Salesforce CRM provides commonly used fields for standard records such as Accounts, Contacts, Opportunities, and Leads. For example, you could add the value "Lukewarm" to the existing values "Cold," "Warm," and "Hot" for the Rating on the Account field.

- **Create fields from scratch.** If you need a field that doesn't already exist, you can easily create a custom field. For example, you could add a field called "Product Name" to your Opportunity record.

- **Do both!** Combine standard fields and custom fields to create the best experience for your users. It's what most successful customers do.

Customizing page layouts

Page layouts define how your fields—standard and custom—look to your users and which fields are required; that is, they can't be saved unless the user enters a value. You'll want to customize your layouts so that they're attractive and easy to use. It may be tempting to create many required fields to force users to enter data; however, keep in mind that user satisfaction tends to suffer when there are too many required fields.

Here's what you can do to customize page layouts:

- Remove unnecessary fields

- Change field locations

- Create new sections

- Determine if filling in a field is required before saving

❗ For additional information, see [Administration Essentials: Customization: Creating a Page Layout](#)

Customizing reports

One of the great things about Salesforce CRM is that it's easy to generate reports with the information that's most important to you. With a large number of standard reports available out of the box, you can be reporting in no time.

In the planning process, you decided what information you wanted to pull from Salesforce CRM based on your current business needs. Then you customized the application based on those needs. Once you've added the custom fields to Salesforce CRM, it's time to re-evaluate if you have all the information you need to pull the proper reports. Now you're ready to start creating your reports.

Here's what you can do with reports:

- Customize the standard reports to better fit your business needs.

- Create custom reports from scratch, which involves deciding which fields they contain, how they're laid out, sorting, date ranges, and charting options.

❗ For more information about customizing reports, see [Administrator Essentials: Analytics: Creating a Custom Report](#)

To lead or not to lead?

An important step in setting up Salesforce CRM is to decide whether or not to use Lead functionality. Leads are a critical part of the sales cycle of most businesses, and Salesforce CRM includes a lot of very useful Lead functionality. Some companies decide not to use Lead functionality because it requires an additional step to turn a prospect into an Opportunity. What's right for you depends on your business processes.

Leads are unique among Salesforce CRM records because they come with special functionality, including:

- **Lead conversion** – A benefit of using Leads in Salesforce CRM is that it creates a separate area in which you can keep information in any kind of format to track anyone who ever expressed interest. This approach keeps a clean distinction between Leads and Contacts, so you don't have to worry about "dirty" data or duplicates. And remember, if you don't use Leads, you can't run an analysis of how Leads convert or the best channels for creating Leads.

- **Reports** – Available reports show conversion rates, the time required to convert a Lead, and those Lead channels that are the best performers when it comes to bringing in deals.

- **Merging Leads** – This functionality is critical because Leads are meant to be a holding area for all prospects. Before converting the Leads to Opportunities, you can merge duplicates to ensure high-quality data and record all Lead activity.

- **Web-to-lead** – Getting Leads from multiple channels is critical to any business. By using the Web-to-Lead functionality, you can easily create forms that capture Leads from your Web site.

❗ To learn more about Leads, see the [Getting the Most From Your Leads](#) resource.

Capturing Leads from your Web site

If you decided to use Leads, it makes sense to also evaluate the Web-to-Lead functionality. You probably have a Web site that lets prospects contact you about your product or service.

To make the most of your Web site:

- Customize Salesforce CRM to use Web-to-Lead functionality to capture Leads when prospects fill in a form.

- Bring that information right into Salesforce CRM.

Setting up this functionality is simple. You decide which fields to include on the Web-to-lead form, create a URL as a landing page (such as a "thank you" page), and click a button to generate the HTML code. Your Web master will jump for joy when you deliver HTML code that's ready to deploy immediately.

❗ To start capturing leads from your Web site, go to Setup -> Customize -> Leads -> Web-to-Lead. For step-by-step instructions, see the [Tips and Hints for Lead Administration](#) resource.

Summary and checklist: make Salesforce CRM your own

This section was all about adapting Salesforce CRM to match the way you do business. At this point, you should know how to:

Progress Checklist
- ❑ Customize fields
- ❑ Customize page layouts
- ❑ Customize reports and documenting changes using the your Reports worksheet
- ❑ Decide whether to use leads
- ❑ Set up the Web-to-lead functionality

Resource Summary
- List of [commonly used fields](#)

- [Administration Essentials: Customization: Creating a Page Layout](#)

- [Administrator Essentials: Analytics: Creating a Custom Report](#)

- [Getting the Most From Your Leads](#)

- [Tips and Hints for Lead Administration](#)

Section 4: Ready, Set, Go

When you have Salesforce CRM set up the way you want it, you're ready to add users. And then there's the final task before you're ready to go live—importing your data into Salesforce CRM.

To help you, Salesforce CRM includes wizards to walk you through the process and provide some tips along the way. This step is probably the most complex task in getting up and running. For that reason, you may want to look into getting help from a salesforce.com partner or from Salesforce.com Consulting.

When the data import is complete, you're ready to train your users and announce that Salesforce CRM is ready for business.

These are the task you'll need to complete before you go live:

- Add users

- Import your data

- Train your users

- Send the go-live announcement

Add users

Adding users in Salesforce CRM is a fairly easy. In Section 2, you learned about profiles and set up your organization's role hierarchy. When you add users, you associate actual users with those profiles so they can log in and access the data that's appropriate for them.

Adding users serves three important purposes:

1. Once you add users, you can import data and automatically associate that data with the correct users.

2. By associating roles and profiles with all users, you can determine how they see data, what they can do in the application, and how their data rolls up.

3. When you add a user, Salesforce CRM uses that user's record to generate an invitation to log into the application.

Tip: If you want to delay notifying users, be sure to uncheck the "Generate new password and notify user immediately" checkbox when you go through the process of adding users. You can edit the user records and generate usernames and passwords whenever you're ready for users to actually log in.

❗ For more information, see the training segment Administrator Essentials: Security and Access: Create a New User

Import data

Most companies already have Account and Contact information stored somewhere—usually in ACT!, Goldmine, or Microsoft Outlook as well as in spreadsheets, on sticky notes, or in the heads of their sales reps. Getting that information out of Outlook and off those sticky notes and into Salesforce CRM is one of the most important steps in the implementation process.

Although you could collect all of these resources and enter them one by one, it's obviously not efficient to enter hundreds or even thousands of records by hand. Salesforce CRM provides a step-by-step data import wizard that walks you through the process of importing Leads, Accounts, and Contacts—and gives some helpful hints along the way.

❗ For more an overview of this process, see the training segment Administration Essentials: Data Utilities: Import Accounts and Contacts

Prepare to import your data

Best practices for importing your data include having a well thought-out plan, properly preparing the data, and doing a test run.

Plan

Complete the Business Process Review – Importing Data worksheet in the Getting Started Workbook. It contains the following information:

▪ Your data sources: Is your data in Outlook, ACT!, or spreadsheets?

▪ A list of fields in your current data records.

▪ A mapping between your current fields and the Salesforce CRM fields.

❗ For instructions on exporting data from external sources see Exporting Contacts from GoldMine and Exporting Contacts from ACT!

❗ For instructions on importing Contacts, see the following resources:

▪ Importing Contacts from Outlook

▪ Importing Contacts from Gmail

▪ Importing Contacts from ACT!

Prepare your data

Starting with clean data really pays off. We highly recommend you "scrub" your data before importing it into Salesforce CRM. Remember: "Garbage in, garbage out."

Here are some tips for preparing your data:

▪ The Salesforce CRM import wizard was designed to work with Microsoft Excel. If necessary, export your data from any other data sources to Excel first.

▪ Now is a good time to standardize naming and clean up your data. For example, set standards for company names (such as International Business Machines instead of IBM) or the way countries are listed (USA instead of United States). Take time to weed out "dirty" data and de-duplicate people who may be in the system multiple times.

▪ Review your Excel file to see if you missed any critical data for which you haven't created custom fields. For example, if your sales reps are tracking the number of employees at each account, you'll need a field to store that information in Salesforce CRM.

▪ Map your data columns to the Salesforce CRM field names. For example, the Company field in Microsoft typically maps to the Account field in Salesforce CRM. Consider renaming the column headers in your Excel file so they match the field names in Salesforce CRM exactly. This step will simplify the mapping step in the wizard.

▪ Wherever possible, assign the correct owners to Records. If you don't have all the Records assigned, the default owner is the administrator who performs the import.

Test the import

Test a small sample—approximately 5 to 10 records—before going ahead with the full import.

When you analyze the test results, try this approach:

▪ Build a custom report or custom view that lets you see at a glance whether the data is laid out correctly.

▪ Open a Record and compare it against the import file. Confirm that the Record's fields show what you want them to show.

- Validate the test results with selected stakeholders or power users.

- Make changes to the import file or make changes to Salesforce CRM based on the test results. For example, data could import incorrectly because it was mapped originally to the wrong field.

- Delete the test records and test again after you've made your changes. Repeat this process until you're sure the data was imported accurately and that it is displayed correctly in the reports and views your users will see.

Import your final data

Once your test results meet your expectations, you're ready to import your file or files.

Here are a few suggestions for importing data:

- **Consider importing data during non-working hours** – If the system is live for some groups before others, this approach helps avoid confusion.

- **Give yourself some cushion for error** – Don't try to import your data the day before sales training, for example.

- **Validate your data** – Run key reports and display important screens to make sure all the data was imported into the fields where it belongs and in the format you want.

❗ Review the tip sheet Importing Your Organization's Data.

Train end users

You've done your homework to follow a clear plan, set up, and customize Salesforce CRM, and you've scrubbed and imported your data. Now, it's time to train your users.

Don't be intimidated by planning your training. Keep it simple and to the point. The last thing you want to do is overwhelm your users—the point is to engage them.

Depending on the complexity of your implementation, your training can range from 1 to 4 hours. Breaking the training into 2 days is another option that may work better for your users. Ideally, you'd hold this training onsite in a conference room and ask everyone to bring their laptops for the training.

❗ Right before training, generate usernames and passwords for everyone who will attend. To generate usernames and passwords, edit the user records and select the "Generate new password and notify immediately" checkbox to automatically send an email to each user with his/her login information.

Follow these steps to create a successful training plan:

1. **Overview & expectation setting** – Remember that you may have been involved in the whole rollout, but your users haven't. Provide a short overview of what Salesforce CRM is, why you chose this application, and what expectations you have for them. This is a great opportunity for your executive sponsor to get involved. He or she can present this information to provide credibility and support. Having the sponsor present at the training also shows how important Salesforce CRM is to your company.

2. **Reinforce your process & terminology** – Create at least one slide on each new process you're rolling out. Companies often use the rollout of a new system to also communicate new processes. For example, you may have a new Opportunity process or you may start using Leads. Don't forget to create a terminology slide explaining the new Salesforce CRM lingo. Many companies ask their users take the following free courses as a prerequisite to their own training classes (scroll down and launch).

   - Getting Started with Salesforce CRM Navigation

   - Getting Started with Salesforce CRM Sales

   - Getting Started with Reports and Dashboards

3. **What's in it for me** – It's important to focus on how Salesforce CRM will benefit your users' work lives: less administrative work, easier reporting, a clear view of their funnel, and easy forecasting.

4. **Hands-on training with real-life scenarios and data** – Providing hands-on training and taking the time to clean your data before training will get you these benefits:

   - **For your users** – It makes the training session more "real." Seeing their actual data and walking through real-life scenarios will give them a great idea of daily life with Salesforce CRM.

   - **For you** – It gives you an opportunity to get real-time feedback and further clean the data, if necessary.

5. **If it's not in Salesforce CRM it doesn't exist** – Take this position when training your users (as harsh as it may sound). This is where it's helpful to have an executive sponsor deliver this section to stress its importance.

6. **How users will be measured** – Having a clear set of metrics in place gives users an idea of how they will be measured: for example, they need to review and make all changes to their data by x date, the sales manager(s) need to be able to view their funnel in the application by x date or all pipeline reports will be pulled from the application by x date. This is another section best delivered by the executive sponsor.

7. **Contests and incentives** – Your users will be more motivated if you kick things off with a contest and incentives. Consider creating a contest such as 1st user to create 15 new Accounts in Salesforce CRM wins a $500 prize or 1st user to generate a pipeline report out of Salesforce CRM wins an iPod. Money is usually the best motivator for sales users, but other prizes like iPods or iPhones work well too. You can even create a leader board in the application to generate some healthy competition.

8. **Q&A** – Definitely leave time in your session for question and answers. Although this step seems basic, it's very important to make your users feel that you have time to answer their questions and get feedback.

9. **Takeaways** – Create a tip sheet with the top things you want your users to take away from the training: terminology, new process flow, and step-by-step instructions for creating an Opportunity. Bonus points if you laminate the tip sheet so users can easily post the list next to their computers.

❗ See "10 Tips for a Successful Training Plan" and take advantage of the following sample training template: Salesforce Training Session.

Go live

Now that your users are trained, you're ready to flip the switch and go live. Send an email to the company congratulating everyone on the project team, as well as the users who attended the training. Include the one-page training guide, if you created one. Remind everyone that Salesforce CRM is the system of record from this point forward, make yourself available for questions, and provide follow-up training if necessary.

Once Salesforce CRM is live, you'll want to make sure you set up the application to attract usage. The log-in rate is important, but it doesn't really show whether users are using the application to its fullest potential. Here are some questions to ask:

- Are users consistently using the tools provided to them?

- Are users sporadic?

- Do you notice a spike in use after training that then falls dramatically 3–4 weeks later?

- Are your users showing "quantity" activities (i.e., number of Opportunities) as well as "quality" activities (i.e., pipeline velocity)?

A great resource for tracking all these metrics is the Adoption Dashboard. It's available for free and can help determine what you want to measure when it comes to adoption. For more information, see step 5: Make Salesforce CRM a Success.

Summary and checklist: ready, set, go

Congratulations. Salesforce CRM is now ready for prime time! At this point, you know how to:

Progress Checklist
❑ Add users

❑ Prepare for data import

❑ Export data to Excel

❑ Test the import to Salesforce CRM

❑ Import the data

❑ Validate the data

❑ Train users

❑ Announce that Salesforce CRM is live

Resource Summary

- [Administrator Essentials: Data Utilities: Import Accounts and Users](#)

- [Administrator Essentials: Security and Access: Create a New User](#)

- [Exporting Contacts from GoldMine](#)

- [Exporting Contacts from ACT!](#)

- [Importing Your Organization's Data](#)

- [Importing Contacts from Outlook](#)

- [Importing Contacts from Gmail](#)

- [Importing Contacts from ACT!](#)

- [Salesforce CRM Training Session template](#)

- ["10 Tips for a Successful Training Plan"](#)

- [Getting Started with Salesforce CRM Navigation](#)

- [Getting Started with Salesforce CRM Sales](#)

- [Getting Started with Reports and Dashboards](#)

- [Adoption Dashboard](#)

Section 5: Make Salesforce CRM a success

Now that you're up and running with Salesforce CRM, you're ready for the next steps that will make it a blowout success and take your sales process to the next level.

Here's what to do next:

- Encourage user adoption
- Increase user adoption with additional functionality
- Manage data quality
- Join the community
- Manage releases

Encourage user adoption

The key to increasing user adoption is supporting users and being responsive to their needs, tracking usage trends over time, and actively encouraging adoption. Understanding what works and what doesn't is critical, both immediately after going live and over the long term.

Here are some key steps you can take to increase adoption:

- Support users
- Measure adoption
- Encourage adoption

Support users

Supporting users is an ongoing process. It involves getting user feedback, training the users, and identifying user champions who'll help their co-workers day to day.

Here are some ideas for user support:

- **Conduct a survey** – The AppExchange includes several survey tools you can use to let users express their likes and dislikes. Use surveys periodically to sample user opinions—and then act on them.

- **Encourage user champions** – Identify users who are enthusiastic about Salesforce CRM and encourage them to help others. Use their success to help inspire others.

- **Address problems quickly & publicly** – Consider any problems an early warning. Fix problems and modify the application based on feedback immediately. Communicate to users how the problems were solved and how their feedback directly affected the application.

- **Offer refresher training** – Additional or "refresher" training doesn't have to be formal; just make sure it's appropriate for each user group. For example, sales managers and sales reps will have different issues and will need different refresher sessions.

Measure adoption

Before you can improve adoption, you have to measure it. Then you can use incentives to actively encourage adoption.

Use the adoption dashboards available through the AppExchange to track login activity and new records added by users. The most common measurement of adoption is the log-in rate, but it can't be the only measure. For a more detailed analysis of usage and adoption, consider these measurements:

- **Object ownership** – Track how many Accounts, Contacts, Activities, and Opportunities each user creates. Use these measurements to quickly identify reps who are not using Salesforce CRM correctly.

- **Key performance indicators (KPIs)** – Get more targeted monitoring with KPIs. Good choices include Opportunities won, Opportunities lost, Loss by competitor, Average deal size, Sales stage duration, Forecast accuracy, and Productivity.

Encourage adoption

Many customers find offering incentives to users can have a big payoff. Here are a few suggestions for encouraging user adoption:

- Identify and reward the strongest adopters. For example, reward those who created the most Reports or Activities or added the most new Contacts. One company gave away iPods to the strongest adopters.

- Communicate about new product features that will help users in their daily work.

- Take the approach, "If it isn't in Salesforce CRM, it doesn't exist."

- Tie adoption to compensation.

- Mandate both timeliness and data quality. Reps must enter prospects and early-stage Opportunities immediately, not just before closing the deal. Otherwise, you lose the advantage of early visibility and won't be able to measure close ratios.

Increase user adoption with additional functionality

In addition to encouraging adoption with support and incentives, providing features that make users' lives easier can play a huge role in adoption. For example, users love Salesforce CRM/Microsoft Outlook integrations because they don't have switch between applications. This feature also lets you capture data previously trapped in your reps' personal computers. Here's are some changes that get great results:

- Leverage the AppExchange

- Integrate Microsoft Outlook and Gmail

- Provide productivity tools such as templates and dashboards

Leverage the AppExchange

BusinessWeek magazine called the AppExchange "The eBay of Business Applications." Here, you'll find hundreds of applications that work together with Salesforce CRM to increase productivity—including dashboards for sales activity, lead and opportunity management, quote generators, and much more.

❗ Go to www.appexchange.com and check it out!

Integrate Outlook and email

To make users more productive, Salesforce CRM is tightly integrated with Microsoft Outlook. This utility performs several important functions that help Salesforce CRM and Outlook work hand-in-hand:

- **Email integration** – Add emails from Outlook to a Contact or Lead record inside Salesforce CRM. Salesforce CRM will look up the Contact based on an email match and give you the option to associate it with an Opportunity as well. This functionality helps you catalog important emails and provides a tremendous boost to effective collaboration.

- **Address book integration** – When sending an email from Outlook you can look up a Contact from inside Salesforce and add it to the To line of your email.

- **Contacts and calendar synchronization** – Force.com for Microsoft Outlook lets you select which Contacts and calendar events you want to synch with Salesforce CRM. You can automate synching at scheduled intervals; a dynamic icon indicates whether a record is up to date.

❗ To integrate Outlook with Salesforce CRM, you first have to install Force.com for Microsoft Outlook. For more information, go to Force.com for Microsoft Outlook.

❗ For additional tips, see Using Force.com for Microsoft Outlook and Administering Force.com for Microsoft Outlook

Provide templates and dashboards

Users love templates and dashboards because they boost productivity, help track progress, and communicate key business information in a way that's easy to understand. Dashboards are great for visualizing complex information and keeping everyone on the same page—and on their toes. Get your teams to identify their key performance indicators (KPIs). Then build dashboards that show, in real time, how they're performing.

Email templates are easy to set up and use. With these templates, users can send out consistent, high-quality, personalized HTML or text emails.

❗ For best practices and instructions on email templates, see Turbo-Charge Customer Communications with Email Templates and Tips for Using HTML Email Templates.

❗ For additional tips on how to increase adoption and ensure success, see "A CRM Champion's Guide to Adoption."

Manage data quality

For a CRM implementation to be successful, you've got to be able trust the data. Here are some suggestions for maintaining data quality.

- **Search before you create** – Teach users to search before creating Records to reduce data duplication. Duplicated data is inevitable, but searching first can help keep it to a manageable level.

- **Standardize naming conventions** – Reinforce standardized naming conventions for company names and addresses. For example, is it U.S.A., USA, or US? Is it Acme or Acme LLC?

- **Merge records** – Although having duplicate records may be inevitable, having a process to keep on top of duplicates is key. Within Salesforce CRM, you can merge duplicate Lead, Account, and Contact data with easy-to-use wizards.

- **Use the Excel connector** – Get bi-directional access to Salesforce CRM from Excel spreadsheets. Use the connector to import records from Excel directly into Salesforce CRM. You can also perform mass updates, which can be very handy for data-cleansing projects. Although this tool is easy to install and easy to use, you need to be careful any time you're manipulating large amounts of live data.

- **Set up data quality dashboards** – Set up a data quality dashboard to highlight when fields are left blank. For example, use a dashboard that indicates the number of times the field "main competitor" was left blank. Or track overdue tasks or the last time a Record was updated.

- **Adopt partner solutions** – Check out solutions on the AppExchange that can be to help improve data quality. For example, Ringlead and DemandTools both automatically de-duplicate your manually created Leads, Web forms, and uploaded Lists.

❗ For best practices and additional tips on data quality, see "6 Steps Toward Top Data Quality" and Managing Data Quality.

❗ For more training on the Excel connector, see Managing Data for Administrators: Advanced Tools and Concepts: Using the Excel Connector

❗ For more information using the Excel connector, see How to Upload Data into Salesforce CRM and the Excel Connector Documentation.

Note: The Excel connector is an open source tool and is **not a supported product**. If you have questions, please use the documentation and check out the Force.com Discussion boards on the Excel Connector.

Join the community

Salesforce CRM users may belong to different communities based on their interests and roles, including business users, developers, and administrators. Salesforce.com provides Web sites where all types of users can find information, share ideas, respond to and rate content, and ask questions.

In addition, salesforce.com supports local user groups across the country and around the world. Join fellow users at local meetings and attend "cloud tours" near you, special events, and salesforce.com's yearly mega-event: Dreamforce.

Check out and join these community sites:

- **Salesforce.com Community** – You're reading this information so we know you found the Salesforce.com Community site. Explore the wealth of resources. See the most popular content and cast your vote. Participate in discussion forums, contribute to the IdeaExchange to see your ideas become part of Salesforce CRM, and find out about local user groups and events in your area.

- **Developer community** – The developer community is for the technically inclined. Here you'll find wikis for all aspects of the Force.com platform, downloads of popular books, and the chance to get a free Developer Edition account.

Manage releases

One of the biggest advantages of Salesforce CRM is that you get about 100 new features for the Force.com platform and the Salesforce CRM applications several times a year—all without much effort on your part. And, unlike with traditional software, your customizations are never lost.

When new releases become available, consider this approach:

1. **Inform yourself** with the following resources:

    - The Release Preview for an overview of new features

    - Release Notes for details, including installation instructions

    - A Webinar in which you'll hear from the product team from each area

2. **Identify** the three most promising features:

    - Use the vision and goals you defined earlier to select the features you want to activate

    - Get input from your users to narrow your short list

    - Sign up for the pre-release program to get your own test environment to try them out

3. **Communicate** about any changes:

    - Send an email and talk to your users

    - Consider mini training sessions to get everyone up to speed

    - Consider using some of the adoption techniques discussed earlier

Summary and checklist: make Salesforce CRM a success

Your adoption rates should be increasing and now you're ready to expand Salesforce CRM with additional features, available in Salesforce CRM or from external partners. As your business grows, you also may want to explore the capabilities of the Salesforce CRM Enterprise Edition and Salesforce CRM Unlimited Edition.

At this point, you know how to:

Progress Checklist

- ❑ Collect user feedback
- ❑ Respond to user feedback
- ❑ Measure adoption trends
- ❑ Encourage user adoption with incentives
- ❑ Add functionality to boost productivity and adoption
- ❑ Define a strategy for maintaining data quality
- ❑ Join the Salesforce.com Community
- ❑ Define a strategy for managing releases

Resource Summary

- The AppExchange
- Force.com for Microsoft Outlook
- Using Force.com for Microsoft Outlook
- Turbo-Charge Customer Communications with Email Templates
- How to Upload Data into Salesforce
- Managing Data for Administrators: Advanced Tools and Concepts: Using the Excel Connector
- Excel Connector Documentation
- A CRM Champion's Guide to Adoption
- The IdeaExchange
- The Salesforce CRM community at Salesforce.com Community
- The developer community at developer.force.com

Salesforce CRM
Getting Started Workbook

Contents

Welcome to Salesforce CRM

This collection of worksheets will support your planning process, document your decisions, and speed up your implementation by helping you to:

- Build your team

- Define your vision

- Define and prioritize your goals

- Define key aspects of your processes and diagram the process flow

- Define fields associated with your processes

- Decide which reports you need

- Prepare to import data into Salesforce CRM

Build Your Team

Use this worksheet to identify the people who'll 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 implementation.	
Project Owner	Guides the project to successful completion. Understands all business process and maps process to the Salesforce CRM implementation.	
Administrator	Gets the application up and running and manages it day to day.	
Power User	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 discussion. Then come up with 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 offers."

"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

Set Your Goals

This section includes worksheets to help you define and prioritize your company's goals, including:

- Documenting current pain points

- Clarifying your business goals

- Prioritizing those goals

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

Document Your Pain Points

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

See the second table for an example and delete when it is no longer needed.

My Pain Points	
Pain Point	Group

Sample Pain Points	
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
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
Can't keep track of incoming IT requests	Other group (such as IT)

Clarify 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. After you complete the step related to defining your business process, return to the last item in this worksheet to complete it.

See the second table for sample business goals and delete when it is no longer needed.

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 of your end users?	•
How are these goals measured?	•

Sample Business Goals	
What does the executive team hope to get out of Salesforce CRM?	• Identify top performers • Identify top customers • Capture leads from the Web site • Know why key deals are lost
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 aren't dropped
How are these goals measured?	• 100% of deals are shown in Salesforce pipeline reports • Increase closed rate by <x> • Reduce dropped leads from <x> to <x>
What are the goals of 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

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.

See the second table for an example of how to prioritize business goals.

My Business Priorities	
Must have	•
Important	•
Nice to have	•

Sample Business Priorities	
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 Web site • Make sure leads tracked via email aren't dropped • Work online and offline

Define Your Process

This section includes the following resources:

- A questionnaire to help define key components of your business process

- 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 commonly used sales process (Lead fields, Account fields, Contact fields, and Opportunity fields).

Identify Key Aspects of Your Business Process

Modify this worksheet 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 ❑ 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 – 20% ❑ 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 <x> ❑ Value proposition ❑ Company viability ❑ Time to value ❑ Other

Document Your Process Diagram

After reviewing the sample Salesforce processes and mapping out your own, include a sketch of that process below.

My Business Process Diagram

Define the Fields Needed for Your Process

Use the following worksheets to identify which standard Salesforce 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 Opportunities 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

My Lead Fields			
Standard Field Name	**Data Type**	**Values**	**Want Field?**
Address	Address		
Annual Revenue	Currency(18,0)		
Campaign	Lookup(Campaign)		
Company*	Text(80)		
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 Other Recreation Retail Shipping Technology Telecommunications Transportation Utilities	
Lead Owner	Lookup(User, Queue)		
Lead Source	Picklist	Advertisement Employee Referral External Referral Partner Public Relations Seminar – Internal Seminar – Partner Trade Show Web	

Define Your Lead Fields (continued)

Standard Field Name	Data Type	Values	Want Field?
Lead Status*	Picklist	Word of mouth Other Contacted Open (Default) Qualified (Converted) Unqualified	
Mobile	Phone		
Name*	Name		
Salutation	Picklist	Mr. Ms. Mrs. Dr. Prof.	
No. of Employees	Number(8,0)		
Phone	Phone		
Rating	Picklist	Hot Warm Cold	
Title	Text(80)		
Website	URL(255)		
Created By*	Lookup(User)		
Last Modified By*	Lookup(User)		
Last Transfer Date	Date		
Custom Field Name	**Data Type**	**Values**	

Define Your Account Fields

My 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)		
Annual Revenue	Currency(18,0)		
Billing Address	Address		
Description	Long Text Area(32000)		
Employees	Number(8,0)		
Fax	Fax		
Industry	Picklist	(see previous)	
Ownership	Picklist	Public Private Subsidiary Other	
Parent Account	Lookup(Account)		
Phone	Phone		
Rating	Picklist	Hot Warm Cold	
Shipping Address	Address		
SIC Code	Text(20)		
Ticker Symbol	Content(20)		
Type	Picklist	Prospect Customer Former Customer Partner Competitor Vendor VAR	
Website	URL(255)		
Created By*	Lookup(User)		
Last Modified By*	Lookup(User)		
Custom Field Name	**Data Type**	**Values**	

Define Your Contact Fields

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

Define Your Opportunity Fields

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

Define Needed Reports

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

For an example, see the worksheet below.

My Reports	
Your Prioritized Business Goals	Standard Reports to Measure Your Goals
Your Prioritized Business Goals	Standard Reports to Measure Your Goals

Sample Reports that Match Business Goals	
Your Prioritized Business Goals	Standard Reports to Measure Your Goals
- Identify top performers - Better visibility into pipeline - Increased close 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 Web site - Make sure leads aren't being dropped - Work online and offline	- Leads by Source - Lead Status, Neglected Leads - N/A

Prepare to Import 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			
PDA			

Meet—and beat—these 8 CRM challenges

Getting any new business solution up and running can be a challenge. By choosing a cloud-based solution such as Salesforce CRM, you'll find that the implementation process—and ongoing maintenance—is much easier than with traditional software solutions. Still, there are some red flags to look out for.

We've identified the 8 most common issues when it comes to implementing CRM. Make sure you have these bases covered and you'll be on your way to success.

Abstract
Get a jump-start on implementing CRM! Use these tips to avoid common pitfalls and get your implementation started on the right foot.

By: Nancye Michaelian

1. Lack of strategic vision
2. No project team
3. No clear business process
4. Not knowing how to measure success
5. No change management process
6. Inadequate training
7. Dirty data
8. Not getting help

Let's explore in more detail at how you can address each of these challenges—and how we can help.

Challenge #1: Define your strategic vision

Every successful CRM project starts with a clear vision of what you want to accomplish. That vision will drive your strategies and decisions at every step of your implementation. What are your business goals? To build long-term relationships, create customer loyalty, increase sales? Your goals should be clear—to everyone in your organization.

To help with this process, use the _Salesforce CRM Getting Started Workbook_ to capture and communicate your vision statement. It's one of the Getting Started resources on the Salesforce.com Community site. Use it as a work in progress to come up with and document all the important decisions about your application.

Challenge #2: Ramp up a project team

To achieve your vision, it helps to have a project team or steering committee that includes major stakeholders. It's a common mistake to assign a single project owner and expect that person to deliver a finished product. To be successful, you need the buy-in and participation of people with various perspectives and skills, including stakeholders from all business units. That way, you can avoid many communication and adoption problems before they start.

If you're a small business, this task may sound a little daunting, but it doesn't have to be. Just make sure you cover the following roles: executive sponsor, project owner, administrator, and a power user.

Use the *Salesforce CRM Getting Started Workbook* to document your team as it grows and evolves.
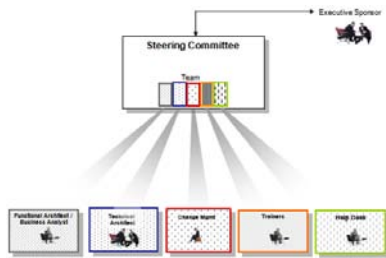
Challenge #3: Define your business process

To get the most from Salesforce CRM, you'll want to make it work the way you do. To do that, it's critical to define your business process so you can prioritize which features, reports, and customizations you want.

As you work to define your process, be aware of too much complexity. If there are too many fields, picklists overflowing with values, or poorly organized page layouts, your users will be overwhelmed, unproductive, and frustrated. Keep it simple and get feedback from prospective users before you launch— and all along the way as you refine and build out your application.

Always keep the following usability goals in mind:

- Match your business process
- Simpler is better
- Organization is everything

For more information on defining your process, go to the Rollout Guide and then to Plan>Define your Process. Document your own process in your MySalesforce.com Workbook.

Challenge #4: Define success

As with everything in life, it helps to reach your goals if you track your progress along the way. So far, we've discussed the importance of having a vision, goals, and a business process that can meet those goals. Along the way, you also need to track those measures that show you're moving toward your goal.

What should you measure? How do you know you're on track—and that you're staying on track? That's where key performance indicators (KPIs) come in. KPIs will show the areas in which the project is meeting your goals. They'll also help to identify whether you need change course.

Common KPIs include the following:

- Closed sales QTD (quarter to date)
- Key opportunities

- Top 5 sales reps

- Lead conversion rate

- Completed activities

In addition to such quantitative metrics, also define goals for adoption rates, performance, and continuous education. Here's a dashboard that can serve as a great starting point for tracking and reaching your goals.

Challenge #5: Manage change

Change is a given. You may find that 6 months after you go live, your application no longer meets some business needs. For example, territories are realigned, an account has too many unused fields, or you might want to add a great new feature.
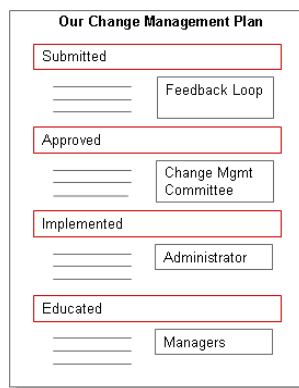
Because Salesforce CRM is so easy to change, you'll need a process to manage these changes, so they don't interfere with your business process or undermine your business strategy. Creating a change management plan helps keep your organization's vision, strategy, and goals closely aligned. Although change management is most critical for complex implementations, customers of all sizes should have a change strategy. Here's a change management example you can use to help manage your changes.

Challenge #6: Train and train again

Although we've won lots of awards for our easy-to-use interface, training is still crucial. In particular, you want to be sure users make the most of the customizations that affect their day-to-day jobs.

Training is one of the most important things you can do to improve adoption and enforce your business process. Be sure to train users initially and reinforce that training periodically. It's also a good idea to create training resources to support your specific implementation, such as newsletters, brown-bag sessions, and tips of the week. Many customers create an Education Web tab to manage their training resources.

Be sure to use salesforce.com's resources to help you train your users and manage your training:

- Free online training

- A free resource for tracking course completion statistics (Setup | Manage Users | Training History)

- Best Practice document "10 tips for a successful training plan"

Challenge #7: Clean your data—and keep it clean

A huge benefit of a CRM application is that you get complete visibility into your pipeline, so you can do accurate forecasting and make good decisions. Dirty data frustrates your users and dooms that goal.

To clean your data and keep it clean, you need a plan. Salesforce.com can help with free and low-cost tools as well as with some great advice. Check out:

- The tools in the Integration and Data Management/Data Cleansing section of the AppExchange

- Best Practice document "6 steps toward top data quality" for achieving and maintaining data quality

Challenge #8: Know where to get help

Because your success is our success, we've created many resources to help you at every stage of your implementation.

- The Salesforce.com Community site, where you'll find instructions and resources to support your project, best-practice information, links to Dreamforce sessions, YouTube video demonstrations, blogs, and more—free

- Training and certification for all types of users

- Free and fee-based customer support offerings

- Consulting services

Enjoy the journey

You can save money, time, and tempers by avoiding the common pitfalls addressed in this paper and by taking advantage of salesforce.com's resources. And remember—Salesforce CRM will always be a work in progress. As your business changes, so should your CRM application.

Also, if your company needs a feature that's not part of our application, use the ideas functionality of Salesforce CRM to let us know. Remember: Our customers drive our product roadmap.

Good luck!

5 steps to a successful implementation

No matter how big or small your company—or the Salesforce CRM project—success requires planning, commitment, and strong sponsorship from your company's executive team. It's also critical that you understand the needs of your managers and users before getting started. Without a detailed understanding of these needs, it's easy to go overboard in customizing the application just because it's so easy.

For detailed information about implementing Salesforce CRM, go to the Getting Started section on the Community pages. You'll find information about individual implementation topics, as well as a Getting Started Guide (scroll down) that pulls all the information together and includes a link to a workbook you can use.

Abstract
Whether you're just starting out or are in the middle of an implementation, this document can help guide you to success.

By Allison Lewinson

Here are the 5 steps to a successful implementation:

1. Plan and prepare
2. Set up and customize
3. Deploy Salesforce CRM
4. Drive adoption
5. Continuously improve

Step 1: Plan and Prepare

Your first step is to plan and prepare. In this step, you'll identify your company's vision, goals, and metrics as well as your resources, tools, and dependencies. Getting this step right is crucial, so you won't waste time or have to back track.

Organize your team

The size and scope of your rollout will determine how many resources you need. However, all project teams should include the following participants:

- **An executive sponsor** – The project's executive champion should participate and support the initiative from the beginning, through go-live and beyond.

- **One or more system administrators** – This person should be involved throughout the implementation and afterward. It's important that the administrator understand the business processes and requirements from managers and users. For information about how to plan administrator resources, see the Best Practice document "Achieving outstanding CRM administration."

- **A project manager** – This person leads the implementation and makes sure the project tasks and overall timeline are on track.

- **One or more power users** – These users help make sure your project will meet the needs of the end users, including management. We also recommend that you use power users as first-line support. To fill that role, consider training these users first and then providing more in-depth training.

- **One or more trainers** – Trainers need to identify relevant materials from salesforce.com or develop custom training materials (such as quick-reference guides). You'll need materials both for the initial implementation to on-board new users and once the application is live, for remediation or for new functionality

Set realistic goals

Your Salesforce CRM implementation will be an ongoing, living process. To get the most from your investment, it's important to roll out functionality early and often. Start with small goals that track against your overall vision. We recommend that you "crawl, walk, run" by keeping your goals simple and attainable and then adding to your achievements.

- Define how Salesforce CRM fits into your overall corporate mission. For example, you may want to focus on collaboration or pipeline management and forecasting.

- Define initial objectives that align with your vision and can be expanded once you deploy.

- Prioritize and document your requirements. Gather requirements from your business and end users and map them to the objectives and overall vision. For example, your users may want to "track tasks and events," so make sure that functionality will be available.

Understand your data

Whether you're moving from another CRM application or simply tracking customer information in applications such as Lotus Notes and spreadsheets, you'll already have existing data. Data always becomes a bottleneck if it's not reviewed and cleaned early in a project.

Most customers underestimate the effort it takes to clean up, map, and load data. Data shouldn't be loaded until your system is set up, including setting up your role hierarchy, sharing model, and sharing rules.

By taking the time to understand your data during the planning stage, you can help define critical questions such as "Are we tracking crucial data?" and "What else should we be tracking?" For more information about the importance of data quality, see the Best Practice "6 steps toward top data quality."

Choose an implementation approach

The two most widely used approaches are the "waterfall" and "scrum" methodologies. Waterfall is the traditional, phased, sequential approach that may lead to a drawn-out implementation timeline. The scrum approach is to constantly build and deliver small units of functionality and revisit and refine them with each cycle.

Salesforce.com uses the more iterative scrum approach for its development. With our regular releases (spring, summer, winter) we deliver new enhancements as soon as we have a baseline of functionality and then build and refine the functionality based on user feedback and use cases. For example, our quoting module was first delivered as a pilot with limited functionality. We added additional functionality in the next release as a beta release. In the next release, we added even more features and made it generally

available. We'll continue to add additional features as customers use quoting and let us know what they want.

Decide which approach suites your business. Many enterprise customers start with the waterfall approach for the initial release and then start using a more agile approach, scheduling regular major (for example, quarterly) and minor (for example, monthly or bi-monthly) releases.

Build a project timeline

Once you've chosen an implementation approach and prioritized all requirements, you can build the project timeline. Every timeline needs to include the time required to design, build, and deploy. Prioritization of requirements is also key to ensure any "must-haves" are included in the first phase or rollout.

If you use a scrum approach, your timeline will consist of short iterations of the design, build, and deployment phases for a smaller set of requirements. With the waterfall approach, the design and build phase includes all requirements prioritized for the initial deployment. For both approaches, consider what tasks can be done in parallel, such as cleaning, mapping, and loading data.

For both approaches, consider each requirement and estimate the effort required to implement it. For example, determine whether you can meet the requirement with out-of-the-box functionality or business processes (low effort) or whether custom development or integration is required (high effort). Use that information to determine how long it will take to implement each requirement.

Note that your timeline may be driven by additional factors, such as when your current system may become unavailable or a new fiscal year. Such considerations are a big reason why it's important to understand your goals, objectives, and must-have requirements.

Step 2: Set up and customize Salesforce CRM

Once you define your requirements, understand your data, and choose an implementation method, you're ready to set up and customize Salesforce CRM. We recommend you keep the initial implementation simple and use the "click-not-code" built-in configuration tools, rather than using Force.com code (Apex) and the pages functionality of the Force.com platform. As you get experience with the application and feedback from your users, consider how to enhance the application with those tools.

Define early how to customize the application. For example, if you need multiple record types for an object and field-level security, identifying that need helps as you create new custom fields and associate them to the correct record type, page layout, and security level in the wizard.

Be careful not to over-configure. For example, one customer created many new fields on its contacts page, which meant users had to scroll—a lot. As a result, they didn't fill out many fields and the company had start over with designing that page.

Here's a suggested approach for setting up and customizing Salesforce CRM:

- **Define the security settings** – Include the organization wide-defaults, roles, and user profiles. Test those settings by logging in with different roles and profiles. Make sure each user type can see, create, and edit information as needed, that the fields are in the right order, and that critical fields are required. Another important step is mapping all the roles to the users who will be added to the system, to ensure all users are associated with the correct roles when you go live.

- **Customize the application** – Create custom fields, page layouts, custom objects, custom tabs, rules, and other application customizations based on the design for each requirement to meet the business needs.

- **Create your reports** – We recommend that you start with the standard reports and customize them as needed to show the information you defined in the planning stage. You can easily customize reports to include any custom fields you need.

Step 3: Deploy Salesforce CRM

The timeline you defined in the planning stage should define the deployment phases and associated schedule. At the first stage, your task is to get your instance of Salesforce CRM "production ready" by creating and adding users, loading your data, and training users.

It's important to communicate early and often, so users know about coming changes. Communication should come from the executive sponsor and focus on both the benefits to the company and what's in it for the users. Build excitement and set expectations. As the deployment draws nearer, outline the deployment plan, including when users will be trained and how they'll be supported.

Add users

Before loading your production data, first load all users. You can load users manually, one at a time, or with the data loader functionality. We recommend you first load all users and data in a sandbox environment before loading the final set of data into your production environment. (Unlimited Edition includes sandboxes; for all other editions, you can purchase sandboxes for an additional fee. Please contact your account executive for more information.)

If you load users with the data loader, the password notification is not automatically sent out. That's good, because you don't want to send out passwords until users have been trained and you're ready for them to log in. If you add users manually, you can select whether the user is notified.

Import data

Because data is loaded at a specific time, the transition will be easier if the data load is as close to deployment as possible. Be sure you schedule enough time to map and test the data. Here's a summary of the steps involved in importing data:

1. Plan your data import

2. Prepare your data

3. Test the import

4. Execute the import

5. Validate your data

Note: If users are still entering data into an existing system after the initial data load but before the go-live or cutover, there may be a set up "delta" data set. You'll need to import or manually load that data and incorporate it into any training exercises.

Train end users

If you have a sandbox environment, you can train end users around the same time you load your data. Use a subset of data—or data developed specifically for training—and plan training with hands-on exercises as close as possible to the go-live date. The sooner users can begin to use the application, the better; that way they can get immediate help in response to any questions.

Once users are trained and using the app, make sure they understand the support process. Define a contact for answering questions. And don't forget about the power users. What if they can't see their data? Schedule regular support sessions for the first week or two; that's when you'll get the most questions. Also, post links to training, job aids, quick reference guides, and where to get help—for example, on your home page.

Salesforce.com provides free online free training for end users. Also check out the following Best Practice documents: "10 tips for a successful training plan" and "How to develop a comprehensive training strategy."

Step 4: Encourage adoption

Once you're up and running, it's critical to get your users on board. To do so, it's important that you support your users, measure adoption, and encourage adoption.

User adoption begins with executive sponsorship. For the initial deployment, the sponsor must communicate clear expectations as well as enthusiasm. Usually, a combination of "carrots" and "sticks" works well, such as a mandate that "If it's not in Salesforce CRM, it doesn't exist." Use exception reports and dashboards to track usage and then use that information to understand where you need encouragement or enforcement.

Measuring adoption is critical, both immediately after go-live and over time. Set up usage reports and use adoption dashboards to track progress right from the start. You'll find adoption dashboards on the AppExchange. Use these dashboards to track login activity and new records added by users—both are a good start in ensuring users are logging in and beginning to use the application.

Also, check out Chapter 5 in the *Getting Started Guide* and the following Best Practice documents: "Beyond login rates; Three key areas for measuring adoption" and "Tips for using incentives and awards to boost adoption."

Step 5: Manage releases

Once Salesforce CRM is live, a new cycle of planning begins for the next phase, as you make available new functionality to add value and respond to user requests. Release management should begin as soon as possible after the initial deployment. This approach will also let end users know that you're addressing their needs and requests. For more information, refer to the *Release Management Best Practices Guide*.

Summary

Although Salesforce CRM is easy to get up and running, proper planning and preparation is essential for a successful implementation. Start by securing executive sponsorship so you have support when building your project team and communicating with the end users. Set up and customize the application so it works for your company's unique needs. And continually revisit and optimize the application, build and refine your metrics, and always keep your end users and overall vision in mind.

To support you in this process before, during, and after your implementation, salesforce.com makes a number of resources available. In addition to the *Getting Started Guide* and associated workbook, we suggest you explore the following:

- CRM Community, where you can participate in the conversation

- Blogs and discussion forums

- User groups near you

- Current Webinars, to get information right from the experts

- Ideas functionality, to suggest new products, promote favorite enhancements, interact with product managers and customers, and preview upcoming releases

- [Answers](#) functionality, to get answers to your burning questions from customers, partners, product specialists, and salesforce.com employees

Achieving outstanding CRM administration

Because salesforce.com takes care of many traditional administration tasks, system administration is easier than ever before. Setting up, customizing the application, training users, and "turning on" the new features that become available with each release—all are just a few clicks away. The person responsible for these tasks is your Salesforce CRM administrator. Because this person is one of the most important resources in making your implementation a success, it's important to carefully choose your administrator and to continually invest in his or her professional development. You can also choose to have salesforce.com handle administrator tasks for you.

Abstract
With software as a service (SaaS), system administration is much easier than with traditional on-premises software. Still, it's critical that you fill the role of administrator—with one of your employees or by using salesforce.com's services.

By: Sylvia Lehnen

Note: Larger enterprise implementations often use a role called Business Analyst or Business Application Manager as well, particularly for planning the implementation and ensuring adoption once the solution is live. Although the most common customization tasks don't require coding, you may want to consider using a professional developer for some custom development tasks, such as writing Force.com code (Apex), developing custom user interfaces with Force.com pages (Visualforce), or completing complex integration or data migration tasks.

In many ways, the administrator fills the role played by traditional IT departments: answering user questions, working with key stakeholders to determine requirements, customizing the application to appeal to users, setting up reporting and dashboards to keep managers happy, keeping an eye on availability and performance, activating the features in new releases, and much more. This paper will help you to make important choices when it comes to administering your Salesforce CRM application, including:

- Finding the right person(s)
- Investing in your administrator(s)
- Providing adequate staffing
- Getting help from salesforce.com

Find the right administrator

Who would make an ideal Salesforce CRM administrator? Experience shows that successful administrators can come from a variety of backgrounds, including sales, sales operations, marketing, support, channel management, and IT. A technical background may be helpful, but is not necessary. What matters most is that your administrator is thoroughly familiar with the customization capabilities of the application and responsive to your users. Here are some qualities to look for in an administrator:

- A solid understanding of your business processes

- Knowledge of the organizational structure and culture to help build relationships with key groups

- Excellent communication, motivational, and presentation skills

- The desire to be the voice of the user in communicating with management

- Analytical skills to respond to requested changes and identify customizations

Invest in your administrator

Investing in your administrator will do wonders for your Salesforce CRM solution. With an administrator who is thoroughly familiar with Salesforce CRM, you'll ensure that your data is safe, your users are productive, and you get the most from your solution.

Salesforce.com offers both self-paced training and classroom training for administrators. For a list of free, self-paced courses, go to Salesforce.com Training & Certification. To ensure that your administrator is fully trained on all aspects of security, user management, data management, and the latest Salesforce CRM features, enroll your administrator in Administration Essentials (ADM201). The price of this course includes the cost of the certification that qualifies your administrators to become Salesforce.com Certified Administrators. For experienced administrators, salesforce.com offers the Advanced Administration (ADM301) course.

Provide adequate staffing

The number of administrators (and, optionally, business analysts) required depends on the size of your business, the complexity of your implementation, the volume of user requests, and so on. One common approach for estimating the number of administrators you need is based on the number of users.

Number of users	Administration resources
1 – 30 users	< 1 full-time administrator
31 – 74 users	1+ full-time administrator
75 – 149 users	1 senior administrator; 1 junior administrator
140 – 499 users	1 business analyst, 2–4 administrators
500 – 750 users	1–2 business analysts, 2–4 administrators
> 750 users	Depends on a variety of factors

In addition to the user base, also consider the points below:

- In small businesses, the role of the administrator is not necessarily a full-time position. In the initial stages of the implementation, the role requires more concentrated time (about 50 percent). After go-live, managing Salesforce CRM day to day requires much less time (about 10–25 percent).

- If you have several business units that use Salesforce CRM solutions—such as sales, marketing, support, professional services, and so on—consider using separate administrators for each group, to spend between 50–100 percent of their time supporting their solutions.

- Another common practice for large implementations is to use "delegated administrators" for specific tasks such as managing users, managing custom objects, or building reports.

- If you operate in multiple geographic regions, consider using one administrator for each major region, such as North America, EMEA, and APAC. To decide how to classify regions, consider whether they have a distinct currency, language, business processes, and so on, and train your administrators in the multicurrency and multilanguage features. Also appoint a lead analyst or administrator who will coordinate the various regions.

- If you need customization beyond the metadata (click not code) capabilities of Salesforce CRM or want to develop new applications, you may also need a developer to create, test, and implement custom code.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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Get these must-have administrator tools

As a Salesforce CRM administrator, it's your job to keep Salesforce CRM humming, your data safe and clean, your users productive, and your managers happy with easy ways to monitor the business. And because Salesforce CRM is always growing and changing, it's important to keep up with new releases.

It's a challenging job, but there are lots of tools to help you in the following areas:

Abstract
Salesforce CRM has dozens of tools to help administrators do their jobs. This document highlights the best.

By Nancye Michaelian

- Ensuring data quality

- Making yourself and your users productive

- Staying on top of releases

- Providing insight into your business

Keep your data clean

According to industry analysts, maintaining data quality is an ongoing effort. But with Salesforce CRM, there are tools to help you out. Here's a summary of what you can do in 3 key areas related to data quality.

1. **Keep data clean** – Because data can be captured from different sources or entered manually, duplication is an ongoing challenge. Ask your reps to search for records before they create new ones to reduce data duplication. Standardize naming conventions for company names and addresses. For example, decide whether to use U.S.A., USA, or US. However, although you can reduce duplicate data, some duplication is inevitable. That's why we recommend you automate data cleansing with data cleansing tools, such as those on the AppExchange.

2. **Enforce data entry standards** – Use default values, define required fields, set up data validation rules, and define workflow field updates to make sure users enter the data you need, the way you need it. For example, you can create a data validation rule on an opportunity that ensures that the value for a custom discount field doesn't exceed a certain percentage. Click to find out more about data validation.

3. **Monitor data quality** – Set up dashboards to monitor the quality of the information users enter. For example, you can set up such dashboards to highlight when fields are left blank, to track overdue tasks, or to track when records are updated.

For more information about data quality, link to the Best Practice "6 steps toward top data quality."

Make everyone productive

As the administrator, there's a lot you can do to make everyone's job easier—including your own.

Productivity tools for administrators include resources you can use to efficiently manage users, processes, and tasks:

- **Import wizard** – Use these wizards to easily import comma-separated (CSV) data files—such as accounts, contacts, leads, solutions, and custom objects—into Salesforce CRM records. Use these wizards for imports or updates of less than 50,000 records.

- **Force.com data loader** – If you need to import more than 50,000 records, or if your data sets are complicated, use this tool. For example, if your sales territories change, you may need to transfer large data sets without limitations.

- **Workflow** – Automate your company's business processes with workflow actions such as email alerts, task updates, field updates, and outbound messaging.

- **Formula fields** – Use custom formula fields to create specific calculations tailored to specific business needs. For example, you can create a formula field on an opportunity that calculates the expected number of days left to the close date of that opportunity.

- **Public groups** – To simplify record sharing and synchronization, create groups of users that fit a particular role or share a territory.

- **Account/sales teams** – Create account teams that work together on an account and define each member's role. You can also create sales teams that work together on sales opportunities. A typical sales team might include an account manager, a sales representative, and a pre-sales consultant. With teams, you can see at a glance who's working on a specific account or opportunity.

- **Process visualizer** – Use this tool to get a visual representation of your approval process so everyone understands each part of the process at a glance.

- **Profile management** – Create lists of profiles and use them to compare profile settings, print profile lists, and make mass updates across multiple profiles.

Productivity tools for end users help them communicate more efficiently with customers and prospects, find information more easily, and access the application while they're on the road. Note that access to these tools depends on the user's profile.

- **Integration with Lotus Notes/Outlook** – Set up desktop integration so users don't have to switch applications when working with Lotus Notes and Outlook. Individual users can download this tool without the administrator's help.

- **Email templates** – Set up email templates to enforce high-quality, standard communications—and to save your reps time and headaches. Both users and administrators can create templates.

- **Tagging** – Set up tagging to make finding information fast and intuitive.

- **Opportunity genius** – Enable this feature to help reps find opportunities that are similar to their deals and were closed successfully.

Manage releases effectively

Three times a year, salesforce.com releases new features and functionality for all applications and the Force.com platform. It's up to you to decide which features you want to make available to your users. For each release, you'll find the following release-specific resources on the Community site:

- **Release Preview** – Get an overview of upcoming features.

- **Release Notes** – Get details about the new features.

- **Release Webinars** – Watch presentations about specific features.

- **Release training** – Check out the online training modules.

- **Tech Talk series** – When there's a new release, this series features product managers explaining the latest features. Plus, it's your chance to get any questions answered.

You may also have change requests to customize your app or to create new apps. For such requests, you have the following tools:

- Use the Metadata API to access to code and data schema. The Metadata API was designed to manage customizations and to build tools that can manage the metadata model, rather than the data itself. This tool is very helpful if you use the Force.com platform.

- Use the Force.com IDE to create, modify, test, and deploy powerful Force.com applications. The IDE provides a comfortable environment for programmers familiar with integrated development environments. Developers can code, compile, test, and deploy their code from within the IDE.

- Use the Force.com sandbox to create a snapshot of your production environment. With the sandbox, you can develop, test, and train without interrupting daily business activities on your production system.

- Use the Code Share directory to collaborate with other developers who build open-source apps.

Give managers unprecedented insight into your business

To support your users and managers, put the information they need at their fingertips with reports and dashboards. Both are built on the analytics that are part of Salesforce CRM. You can also browse the analytic applications on the AppExchange.

To get started, talk to your managers to find out what they want to measure and what key performance indicators (KPIs) define success. For example, your managers may want to measure any or all of these metrics: number of leads, number of leads at a certain status, lead conversion rates, opportunities in the pipeline and forecast, or trending. When you define what metrics to highlight, it's important to have well-defined business objectives that support your company's vision.

You can display analytics as reports or dashboards. Reports typically summarize data in tables and help you get an overview of performance over time. Dashboards show important company metrics as graphics. Because this information is displayed in real time, dashboards are great for an immediate view of the current situation.

Salesforce.com provides a number of ready-made reports and dashboards. You can customize these or create your own. For more information or assistance, download and print the Reports and Dashboard tip sheets.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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Using data access design patterns

Data access, or record sharing, is the process by which users can see records within a single object, such as the account object, or within child objects, such as the opportunity object. Data access also determines which records are returned in searches, displayed in views, and shown in reports.

The design process for all implementations, regardless of size or scope, starts with defining which records users are permitted to see. It's a crucial step because a CRM system is a tool for making operational the data you store about your business relationships. When users have access to the right data, they can work faster and more accurately. When they don't, they waste time trying to find important information—even worse, they see sensitive data not appropriate to their job function.

This document is an ideal starting point if you're implementing a large, enterprise-level system. Before you design, re-design, or implement Salesforce CRM, be sure you understand all your data access options.

Abstract
Properly controlling access to sensitive information in your system is vital to CRM success. Start with this document to understand all your options for sharing settings, role hierarchy, sharing rules, and territory management.

By Tad Travis

Design data access with clicks, not code

Salesforce CRM includes powerful, configurable functions for controlling access to records. Below are the 9 most important functions, listed in the order you should consider them during your design process. Please note: Your data management options depend on your edition of Salesforce CRM.

1. **Profile** – For each object, set users' read, create, edit, and delete permissions by controlling their profile assignment. To see records in an object, a user's profile must have at least read access.

2. **Record ownership** – Every record must be owned by a licensed salesforce.com user or by a queue (for cases).

3. **Sharing settings / organization-wide defaults** – Use these settings to define the data access model, which defaults to "always-on" rules for seeing records for each object.

4. **Role hierarchy** – Use the hierarchy to define your organization in a tree-like structure; it's essential to data access because it defines who can see data owned by other users.

5. **Grant access via hierarchies** – Enable default "always-on" rules for manager-level access to specific objects.

6. **Sharing rules** – In restricted access models, use to enable "always-on" exception rules for wider access by classes of users, for a specific object.

7. **Manual sharing** – Record owners can use manual sharing to give read and edit permissions to users who would not have access to the record otherwise.

8. **Account and sales teams** – An account team is a team of users that work together on a single account; a sales team is a group of users that work on a single opportunity.

9. **Territory management** – Use to provide access to account records depending on a user's assignment to one or more territories. This option is relevant to companies that maintain large, geographically dispersed sales teams and manage large account record volumes/

Together, these functions define your data access model, described on the next page.

The functions are interdependent, meaning that when users retrieve records, each component is evaluated progressively, in real time. Each time a user queries the system, Salesforce CRM evaluates the meta-data rules underlying each component, returning only those records that meet the filtering criteria. For an excellent example of the how these rules are sequenced and evaluated, see the model in Help and Training.

For detailed information on configurable profiles, org-wide defaults, the role hierarchy, and sharing rules settings, please see the Tips and Hints document in Help and Training. This document will also help you understand the sequence of actions the system takes to determine real-time access to records.

You'll notice that reporting is not included in this list. Data access and reporting are two different things. You need to account for all record access components *before* you can build reports, otherwise users won't be able to see the appropriate records in their reports or views. Field-level settings are also not included in this list; however, more information on field-level security is available in Help and Training.

The remainder of this document explores the most important design considerations for enterprise implementations: your data access model, sharing settings (default org-wide object defaults), the role hierarchy, sharing rules, and territory management.

About data access models

Before configuring your system, it's a best practice describe your high-level data access requirements in the form of a data access model. The model is an abstraction, but it's a useful tool for describing what kinds of records certain classes of users can access. There are 3 types of data access models. Each model is defined by the default sharing model, which you configure with the organization-wide defaults and record ownership rules. Review these options to determine the best fit for your company.

Many other apps can also make your marketing campaigns sing!

1. **Private access model** – Users are prohibited from accessing most account, contact, opportunity, activity, and custom object records of other users, even in their departments. If you want these restrictions, a private model is best.

   > **Requirements**
   >
   > You want to restrict access to accounts, contacts, opportunities, and cases among users who perform similar job functions. For example, reps in two different districts can't view each other's opportunities.
   >
   > You plan to use the partner portal. A private model will prevent inadvertently exposing sensitive records to partner users.
   >
   > You have large data volumes. A private model will help restrict the number of records returned in searches, views, and reports.
   >
   > You plan to use territory management.

Not many large companies—except possibly financial services firms—use a fully private sharing model because it has a significant impact on the data returned in reports and searches. So consider all your business requirements before proceeding with this model.

2. **Public access model** – If you have no restrictions on accounts, contacts, opportunities, activities, cases, or custom object access, then a public model is best. This model results in immediate productivity improvements because it saves data retrieval time and makes it easier for colleagues to collaborate.

3. **Hybrid access model** – In this model, users have unlimited access to most standard objects, but are restricted from accessing records not directly related to their job functions. Most enterprise-level companies use a hybrid model.

If it's obvious that a public model meets your needs, then configure your per-object organization-wide defaults with either Public Read/Write or Public Read Only settings (see the next section for an explanation). But if you decide a private or hybrid model is appropriate for your organization, review all the configuration considerations below.

Defining organization-wide defaults and record ownership

Your first step in setting a private or hybrid model is to configure your organization-wide defaults and record ownership rules. The organization-wide defaults specify the default, always-on level of access to a record. These defaults can be set separately for accounts (including assets and contracts), activities, contacts, campaigns, cases, leads, opportunities, calendars, price books, and custom objects. For most objects, organization-wide defaults can be set to Private, Public Read Only, or Public Read/Write. See Sharing Model Fields for your options.

Every record must by "owned" by a licensed salesforce.com user or a queue (for cases), as shown in these examples:

Account record

| Account Owner | Wendy West [Change] |
| Account Name | Universal Containers [View Hierarchy] |

Opportunity record

| Opportunity Owner | Cindy Central [Change] |
| Opportunity Name | Associated Supply Co. - 10K |

Case record

| Case Owner | Tier 2 Escalation Queue [Change] |
| Case Number | 00001176 |

Record ownership has two important implications on the data access model. First, it determines default read/write access, meaning that record owners can always read and edit records they own. Second, ownership also drives the default reporting functions on the account and opportunity reports.

How do these functions work together? Below is an example of a typical hybrid model.

Object	Sharing setting	Record owner	Explanation
Accounts	Public Read Only	Jessica Cho (CEO)	No record viewing restrictions
Contacts	Controlled by Parent	Wendy West (AE)	
Activities	Controlled by Parent	Wendy West (AE)	Activities public if associated with public object; otherwise, they're private
Opportunities	Private	Cindy Central (AE)	Accessible only to record owners and users above them in the role hierarchy
Cases	Public Read/Write/Transfer	Tier 2 Escalation Queue	Any user can view and edit cases
Business plan (child to account)	Private	Cindy Central (AE)	Accessible only to record owners and users above them in the role hierarchy

For a detailed definition of the sharing setting values, please see Help and Training.

Defining the role hierarchy

The role hierarchy is the third component of the data access model. It's as important as sharing rules for determining record access in private or hybrid models. Users are assigned to a branch in the role hierarchy to give them the proper default access to records owned by other users.

Users at any given level in the hierarchy can view, edit, and report on all data owned by or shared with users below them in the hierarchy, regardless of the organization's sharing model. This approach ensures that managers can always access the same data as their employees, regardless of the organization-wide default settings.

Your role hierarchy usually mirrors your sales organization structure or your support center structure, but it need not match your organization chart exactly. For examples of common role hierarchy design patterns, see the table below.

Example	Description

⊟ CEO / Operations Edit | Del | Assign
⟋ Add Role
 ⊞ CFO Edit | Del | Assign
  ⟋ Add Role
 ⊞ COO Edit | Del | Assign
  ⟋ Add Role
 ⊟ SVP, Customer Service & Support Edit | Del | Assign
  ⟋ Add Role
  ⊞ Customer Support, International Edit | Del | Assign
   ⟋ Add Role
  ⊞ Customer Support, North America Edit | Del | Assign
   ⟋ Add Role
  ⊞ Installation & Repair Services Edit | Del | Assign
   ⟋ Add Role
  ⊞ SVP, Sales & Marketing Edit | Del | Assign
   ⟋ Add Role
	Operations users need access to all records, so they are assigned to the same node as the CEO. Users who need access to the greatest number of records, regardless of object, should be assigned to a role near the top of the hierarchy. This requirement often results in a role hierarchy that puts analysts above SVPs, but that's a perfectly acceptable design.
	
	Users in the CFO node own confidential records such as contracts and business development plans, so they have their own role node. These users can access private records owned by sales users via sharing rules.
	
	To grant the SVP Customer Service and Support access to all sales-related records, sales & marketing roll up to customer service and support.

⊟ VP, International Sales Edit | Del | Assign
 ⟋ Add Role
⊟ VP, Marketing Edit | Del | Assign
 ⟋ Add Role
 ⊟ Marketing Team Edit | Del | Assign
  ⟋ Add Role
⊟ VP, North American Sales Edit | Del | Assign
 ⟋ Add Role
 ⊟ Director, Channel Sales Edit | Del | Assign
  ⟋ Add Role
  ⊟ Channel Sales Team Edit | Del | Assign
   ⟋ Add Role
 ⊟ Director, Direct Sales Edit | Del | Assign
  ⟋ Add Role
  ⊟ Eastern Sales Team Edit | Del | Assign
   ⟋ Add Role
  ⊟ Western Sales Team Edit | Del | Assign
   ⟋ Add Role
	Every user must be assigned to a role or his/her data will not display in opportunity reports, forecast roll-ups, and other displays based on roles.
	
	The sales organization uses both direct and indirect (channel) sales roles because each group submits independent sales forecasts.
	
	Representatives can only be assigned to a single regional sales team.
	
	Members of the East Team can view all the opportunities owned by users with the East role, but West Team users cannot view those roles, thanks to the role hierarchy.
	
	It's also common to create a separate role for each unique sales territory within each sales region.

For additional configuration information about role hierarchy functions, see Help and Training.

Role hierarchy design considerations

Because the role hierarchy is so critical to your data access design, be sure to address the considerations in the following table before moving forward.

Research shows that customers who are trained by salesforce.com achieve a 52 percent higher adoption rate. Be sure to take advantage of the free training available from the Help & Training links in your application and on the Salesforce.com Community Web site.

Consideration	This means that….
Design trade-off: too much vs. too little abstraction	The greater the number of roles, the greater the change management burden. Too few roles and your reports don't have the right granularity or it will be more difficult to implement content workgroups. There is no mathematical function that calculates the right number of roles for your organization, so be prepared to develop your roles iteratively.
Customized forecasting hierarchy is cloned from the role hierarchy	If you plan to use customized forecasting, your role hierarchy should mirror your sales or support organization. Updates to your role hierarchy do not update your customized forecasting hierarchy.
When territory management (TM) is deployed, the role hierarchy and TM both govern record access	Users at the top of the role hierarchy will have access to accounts and opportunities, even if opportunities are private and access is proscribed by TM. In the case of overlapping rules, the most permissive setting wins.
Grant access using hierarchies is always enabled on all standard objects	In a private data access model, users at the top of the role hierarchy will have access to accounts and opportunities. By default, users in different branches of the hierarchy cannot see one another's opportunities.
Grant access using hierarchies must be enabled on all custom objects displayed in the customer or partner portals	This setting is necessary to prevent exposing sensitive records to portal users. Additionally, restrict access by portal users using new sharing rules that include the setting "roles and internal subordinates."
Exceptions to role hierarchy access	Use sharing

Sharing: managing exceptions to the rules

If you set the organization-wide sharing defaults to Public Read Only or Private on some objects, you can define rules that give additional users access to records they do not own.

Sharing rules can only be used to grant *additional* access, not to restrict access to records beyond restrictions originally specified with the sharing model through organization-wide defaults. You can create sharing rules that are based on the record owner or on the record's field values.

To provide additional access, salesforce.com provides 4 classes of sharing functions to manage always-on and one-off exceptions to your private sharing model.

1. **Sharing rules** – You can use sharing rules to automatically grant selective record access to defined sets of users, based on record ownership or on the record's field values. You can define up to 100 owner-based sharing rules for each object. Sharing rules are ideal for granting broad types of access. Records owned by internal roles, territories, public groups, queues, and portal roles can be shared with internal roles, customers, or portal users. Sharing rules are also important for granting granular record access, where records owned by a specific role can be shared more broadly with internal roles.

    Note: Sharing rule permissions depend on your edition. See [Help and Training](#) for additional information.

2. **Manual sharing** – Because it's often difficult to define every sharing rule users need, manual sharing is ideal for allowing one-off record access to classes of users who would not have access in any other way. Manual sharing isn't automated; record owners must manually share each record that requires wider access.

    Sharing rules address the following typical scenario: An APAC sales representative owns the business relationship with an international manufacturer, which has subsidiary companies in the U.S. and Germany. A local U.S. representative finds a new opportunity with the U.S. subsidiary, which is required to get funding approval from the parent company. To drive the deal, the U.S.

representative grants read-write access on her opportunity to her APAC counterpart. For more information on configuring manual sharing, see Help and Training.

3. **Account teams and sales Teams** – Account teams give users the freedom to set default account teams that include those employees who normally work together on an account. Users can automatically add default account teams to all accounts. Sales teams can do the same while working on opportunities.

4. **Apex managed sharing** – Apex managed sharing lets developers use Force.com code (Apex) to programmatically share custom objects. When you use Apex managed sharing to share a custom object, only users with the Modify All Data permission can add or change the sharing on the custom object's record. Also, the sharing access is maintained across record owner changes. For more information on Apex managed sharing, see the *Force.com Apex Code Developer's Guide*.

You can use all these methods for the following sharing options: public groups, personal groups, users, roles, roles and subordinates, roles and internal subordinates, internal and portal subordinates, territories, and territories and subordinates. See Help and Training for definitions and usage recommendations.

Sharing design considerations

Sharing rules makes it possible to be flexible when assigning record access; be sure to review the following considerations before adding sharing rules to your system.

Consideration	This means that….
Opportunity and case access when accounts are private	When sharing an opportunity or case, users must have at least read access to the associated account (unless you're sharing a case via a case team). If you also have privileges to share the account, users are automatically given read access to the account. If you don't have privileges to share the account, you must ask the account owner to give the users read access.
Contact access	Contact access is not available when the organization-wide default for contacts is set to Controlled by Parent.
Controlling access to associated child records	For sharing rules that specify access for associated object records, the given access level applies only to that sharing rule. For example, if an account sharing rule specifies Private as the access level for associated contacts, a user may still have access to associated contacts via other means, such as the organization-wide defaults, the "Modify All Data" or "View All Data" administrative permission, or the "Modify All" or "View All" object permission.
Apex sharing reasons	If using Apex sharing reasons, select a reason for the share so users and administrators understand the source of the sharing. For more information about sharing reasons, see Creating Apex Sharing Reasons.

Territory Management: automate account access

Territory Management (TM) is the final component of the data access model. TM is designed to automate how large volumes of account records are assigned to users, thanks to declarative business rules triggered by account record attributes such as zip code, industry, revenue, or another custom field relevant to your business.

Why use TM?

With TM, you immediately gain these benefits:

▪ **Assign account records to territories with declarative business rules and explicit assignments** – Automate account record access to expand a private access model

▪ **Organization management** – Manage complex and frequently changing sales organization structures

- **Alignment and re-alignment** – Get support for transferring users between territories, with the option to retain opportunities

- **Forecasting** – Get multiple forecasts per user, based on territory membership

- **Reporting** – Gain the option to create territory-based sales reports

In addition to controlling access to accounts for users in each territory, you can control users' access to the opportunities and cases associated with those accounts, regardless of who owns the records. For more information, see Territory Fields.

Is TM right for you?

TM is not appropriate for everyone. Don't deploy TM unless your organization meets most of these requirements:

- **Automated assignment** – You need to mass-assign or automatically assign account records **using only account criteria** to expand a private sharing model

- **Re-organization** – Your organizational structure is complex or changes frequently

- **Alignment and re-alignment** – You need to automate the territory re-alignment (user-to-territory and territory-to-account) process and also maintain explicit territory-to-account alignment conditions

- **Forecasting** – You need to submit forecasts at the territory level, not at the user level

- **Reporting** – You need territory-specific reports, not user- or role-specific reports

Typical companies that implement TM already have a mature territory management process, as is often the case in the pharmaceutical, technology, and media industries. If your company doesn't have such a process, we recommend that you deploy TM only after you considered all its functions and are sure it meets your needs. For more help deciding whether TM is right for you, see this Best Practice: "4 steps to deciding if Territory Management is right for you."

In addition, TM only governs the assignment of accounts and the standard objects that have a master-detail relationship to accounts, opportunities, and contacts. For example, opportunities are included in TM, but leads and activities are not. That means that, if you have private records such as "Business Plan" that are children to accounts, access to those records is not automatically granted via territory associations.

Finally, TM can only be enabled in your instance if you have a full-copy sandbox. Contact Support if you're not certain whether you purchased or activated a sandbox.

Additional information is available in these resources:

- Territory Management FAQ

- Tips & Hints for Working with Territories

- Deploying Territory Management

TM functional considerations

Once you enable TM it can't be disabled, so evaluate the following features before proceeding:

Feature	This means that….
Dynamic account-to-territory assignments	Drive re-alignments and new record assignments using declarative business rules, not code.
Explicit account-to-territory assignment	If you use "named accounts" ownership or have ownership rule exceptions, you can use TM to directly assign accounts to users via each user's association with a territory.
User-to-territory assignments	Assignments are explicitly declared in the TM system.
A user can be assigned to >1 territory	You can implement pods, overlays, and temporary territory coverage functions.
A territory can have >1 user	You can implement pods and shared territories.
Territory hierarchy granularity	The hierarchy is an exact re-creation of your sales organization.
Role hierarchy vs. territory hierarchy	If you implement TM, your territory hierarchy governs your default record access in a private sharing model, which means you can simplify your role hierarchy with fewer roles. But territory management doesn't supersede the role hierarchy. The most permissive setting wins.
Account ownership	Account ownership doesn't have the same significance because TM determines default record access in a private sharing model. Most customers revert ownership to a single default record owner in this case.
Inheritance of opportunities	In some cases, opportunities automatically inherit the territory value assigned to the account.
Re-alignment modeling and "what-if" analysis	You cannot define more than one territory alignment, but assignments can be tested using the "Preview Account Assignment" function in sandbox.
API access	Territories are exposed to the API, so you can load territories from a .csv file. Additional API functions are included in Help & Training.

Lastly, because of the scope of this functionality and its impact on record access, we highly recommend that you consult with a TM expert from an implementation partner before proceeding.

Summary: Best practices for designing your data access model

Because the record access model is so important, plan to spend sufficient time on analysis and design. Below are several recommendations and best practices, gleaned from the most complex implementations.

▪ **Define your business requirements** – Every complex implementation has complex requirements. Create a list of the most important business needs, written as business requirements, as shown in the examples below.

Requirements

Accounts owned by Americas Inside Sales Representatives must be accessible by all other Americas Direct Sales Representatives; otherwise the accounts are private to all other users.

Opportunities owned by Global Account Managers must be accessible to all Direct Sales Users.

Business Plan records are only editable by the owner of the record and managers above the owner in the role hierarchy.

Customer Service Representatives must be able to access all account and contact records, even if the account is owned by a user who is not in the CSR's region.

- **Define use cases** – Although use cases can be challenging to write, they are absolutely necessary to explain your conceptual data access model to others. Use cases are also important for getting user acceptance and for creating system testing scripts

- **Analyze your requirements and use cases** – After analyzing both, you can determine your data access model (private, public model) and whether you should deploy TM

- **Design your default object sharing settings** for each object in your system

- **Design sharing rules –** Determine which exception requirements can be satisfied with sharing rules versus one-off methods such as account teams or sharing

- **Design your territory hierarchy –** Include your sales organization structure and user-to-territory assignments

- **Design your territory assignment rules** for automated account-to-territory assignments

Use an iterative design and build process. Complex businesses typically have complex requirements and rules, so it's common to not get everything right the first time. Design iteratively, test as you go, and be prepared to make adjustments.

If you're already running your business in Salesforce CRM, you may need to make immediate changes to your access model. Despite the urgency, **never** test these changes in production to avoid inadvertently exposing private records to users.

If you have questions about other implementation best practices, please go to the Salesforce.com Answers Community, where you can get input from other salesforce.com users

Managing your Salesforce CRM storage

As our customers' applications mature and grow more complex, so do their storage needs. As of the Winter '09 release, storage options have increased substantially, as shown in the summary table below.

Your storage is split into two buckets: file storage and data storage. File storage holds attachments, anything in the Documents tab, and anything in the content library. Data storage holds everything else—all your records, including all tasks, activities, accounts, opportunities, custom object records, and so on.

Abstract
Understand your storage limits, learn to make the most of your storage, and find out about your options for expanding storage.

By Jason Suen & Nigel Young

In this document, you'll find out:

- About storage limits by edition
- How to view your storage usage
- How to make the most of your storage
- About AppExchange apps related to storage management

Storage limits by edition

The amount of storage for both files and data depends on your edition, as shown in the table below.

	Group Edition	Professional/Enterprise Edition	Unlimited Edition
Data storage	1GB across all users	20MB/user or 1GB minimum	120MB/user or 1GB minimum
File storage	1GB across all users	600MB/user or 1GB minimum	600MB/user or 1GB minimum

Many customers ask just how many records can be stored in 1GB. The answer is about 500,000 records. As announced at Dreamforce 2009, the content library functionality of Salesforce CRM will be made available to all customers, but (as of the publication of this document) it has not been determined whether additional storage will be made available as well.

View your storage usage

Click *Setup | Administration Setup | Data Management | Storage Usage* to get a breakdown of your usage by object, user, and individual files. You'll also see the difference between file storage and data storage usage, as shown in the graphic on the next page.

Strategies for making the most of your storage

You have several options for managing your data so you don't exceed your storage usage limits, including purchasing additional storage, using mass-delete tools or applications to delete records and attachments, and storing attachments locally.

Purchase additional storage

You can purchase and immediately activate additional storage—data storage in 50MB and 500MB blocks; file storage in 1GB and 10GB blocks. Contact your account executive for additional information.

Mass delete records

Which tools or applications you can use depends on the number of records you want to delete, the types of records to be deleted, and your edition of Salesforce CRM.

Examples of records you might want to mass delete include:

- Dead opportunities or opportunities with no activity in the past 12 months

- Unconverted leads with no activity in the past 12 months

- Accounts with no activity in the past 3 years

- Archived tasks and events older than 5 years

- Closed cases older than 5 years

- Expired solutions

Note: Before mass deleting with any of the following tools, we recommend that you **archive** a copy of the data to be deleted, in case you need to restore those records later. Also, always test mass deletions on a small sample of test records first.

We also recommend that you request **a weekly export of your data** for backup. This service is included with Enterprise and Unlimited Editions and is available for purchase with Professional Edition. Please contact your account executive for more information.

The following tools are available for mass deleting records:

- You can delete up to 250 records at a time, including accounts, leads, activities, contacts, cases, solutions, and products. Go to *Setup | Administration Setup | Data Management | Mass Delete Records*.

- For Enterprise and Unlimited Edition customers, there's a [free AppExchange tool](#) your can install into your Salesforce CRM org. This application adds custom buttons to list views so you can mass delete the objects mentioned above **plus** campaigns, opportunities, opportunity products, contracts, and assets.

- You can mass delete standard and custom object data using the [Excel Connector](#) (Professional, Enterprise, and Unlimited Editions) or the [Apex Data Loader](#) (Enterprise and Unlimited Editions). Both tools can be used to create extract files in Excel. You can sort and filter that file—typically by Date or Create Date—and use it to mass delete the records.

  - Because the Excel Connector has a limit of about 67K records per worksheet, you may need to use multiple worksheets.

  - The Apex Data Loader can delete up to 50,000 records at a time. You may need to use multiple extract files for very large data volumes.

  Note: If you plan to extract and delete an extremely high volume of records (> 250,000), we suggest you request a data export and let salesforce.com generate the extract files for you.

The Apex Data Loader's wizard helps guide you through a powerful mass data editing tool

Delete attachments

As with deleting records, you options depend on the size of your attachments and your edition.

- View your storage usage to see your largest attachments and drill down on those you want to delete. Go to *Setup | Administration Setup | Data Management | Storage Usage*.

- Enterprise and Unlimited Edition customers can download the [Attachment Manager](#) app from the AppExchange to view, sort, filter, and delete multiple attachments.

- Create lists with attachments with the Excel Connector and Apex Data Loader. These tools do not support the extraction of attachments, but you can use them to create lists of attachments to be deleted in bulk.

  Note: You cannot use these tools to archive attachments to be deleted: We recommend the weekly export service to extract attachments for archiving.

Store attachments locally

Consider storing files locally on your computer or in a network folder and creating a custom link that points to that folder or file. For example, you could create a custom link on the account page layout that points to the network folder in which account-related files are stored. Of course, the user needs the appropriate connectivity and authority to access your network while using Salesforce CRM.

Need more options? Check out the AppExchange

You'll find additional options for increasing your storage on the AppExchange, ranging from cloud storage services to integrations between Salesforce CRM and your network drives. Check out the following options for cloud storage and network drives:

- **Appirio Cloud Storage** – Recommended for customers with high storage needs, this app lets you securely expand storage right from the Salesforce CRM interface by creating a link between Salesforce CRM and Amazon S3. There's also a version for Professional Edition customers.

- **S-Drive** – Another service that uses Amazon S3's secure cloud storage, this application creates storage space on secure, hosted servers that can be integrated with Salesforce CRM. This tool works with Professional, Enterprise, Unlimited, and Developer Editions.

- **External attachments** – With this app, you can easily attach and access attachments directly from records in Salesforce CRM. This free app is available for Enterprise and Unlimited Edition customers.

- **FTP Attachments** – Use this app to store attachments on your servers, including FTP, S3, and even hard disk. This tool, which also includes versioning capabilities, works with Professional, Enterprise, Unlimited, and Developer Editions.

Summary

With the increases in storage, most customers will have plenty of room for their records and files. However, if you still need to expand your storage capabilities, this table summarizes your options:

	Professional Edition	Enterprise Edition/ Unlimited Edition	Additional cost?	Data volume
GENERAL				
Purchase additional storage	Yes	Yes	Yes	High
Weekly data export service (for archiving)	No	Yes	Yes	Any
RECORDS				
Manual deletions	Yes	Yes	No	Low
Mass-delete records	Yes	Yes	No	Medium
Mass-delete application	No	Yes	No	Medium
Mass deletions and archiving using Excel Connector	Yes	Yes	No	High
Mass deletions and archiving using Data Loader	No	Yes	No	High
ATTACHMENTS				
Manual deletions	Yes	Yes	No	Low
Mass deletions using Attachment Manager application	No	Yes	No	Medium
Mass deletions using Excel Connector	Yes	Yes	No	High
Mass deletions using Data Loader	No	Yes	No	High
Store locally/access via custom link	Yes	Yes	No	Medium/High
Document management applications on the AppExchange	Varies	Yes	Varies	Medium/High

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

3 tips to get unstuck when creating a formula

If you can write a formula in Excel, you can write one in Salesforce. However, if you ever need help, here are 3 tips to help find a solution:

1. Check a reference
2. Write it down, then break it up
3. Ask the community

Abstract
Salesforce administrators—Have you ever gotten stuck creating a formula? Here are 3 tips to help solve your problem.

By Terrence Hall

Tip 1: Check a reference

The following references explain how to use formulas and give you ideas on how to get started:

- **Help and Training** – Click Help & Training on any Salesforce page and type in the formula function you want to use. You'll get a description of how to use the function as well as some examples.

- **Formula cheat sheet** – If you're not sure which formula function to use, print this two-page cheat sheet, which lists common functions in groupings.

- **Useful validation rules** – Don't reinvent the wheel, modify it. Look at examples of validation rules, ranging from ensuring valid postal codes to preventing reps from being too generous with discounts on quotes. When you find a validation rule you like, customize the formula to suit your needs.

Tip 2: Write it down, then break it up

If your formula gets too complicated, start from the beginning and break up it up into smaller steps.

For example, let's say you want to assign a rating of Hot, Warm, or Cold to a lead, based on a score assigned by marketing. In addition, you want to display the rating as an image. To accomplish this task, you'll use IF and IMAGE functions for your formula.

1. First, start by using comment tags (/*   */) to spell out the basics. Don't forget to add the date and your name for future reference.

Between the comment tags /* */, state the formula's goal

2. You'll use two IF statements in this formula. To get the first IF statement to work, use placeholders for the hot image and for the second IF statement. Then click Check Syntax to make sure there are no problems with your formula. If everything is OK, you'll get the message "No syntax errors in merge fields or functions"; if not, the message will explain the type of error.

Use placeholders for the Hot image and second IF statements.

Write your first IF statement.
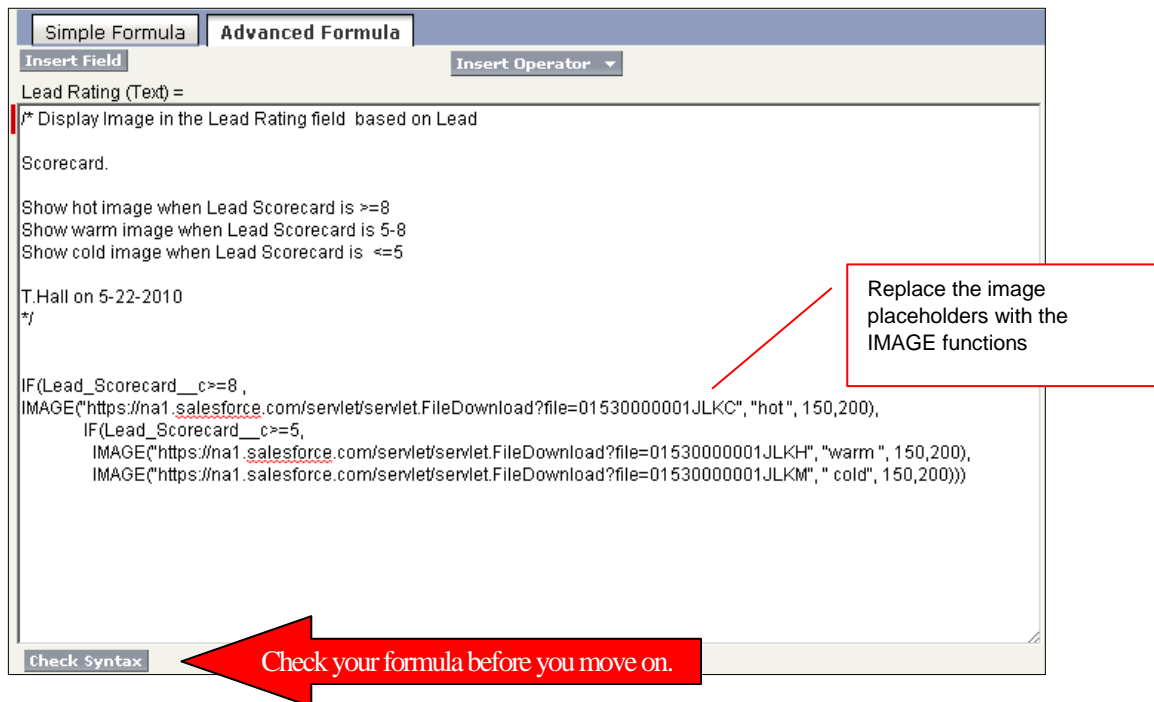
Check your formula before you move on.

3. Once the first IF statement works, plug in the second IF statement, replacing the placeholder for "When not Hot." Click Check Syntax again to check your work.
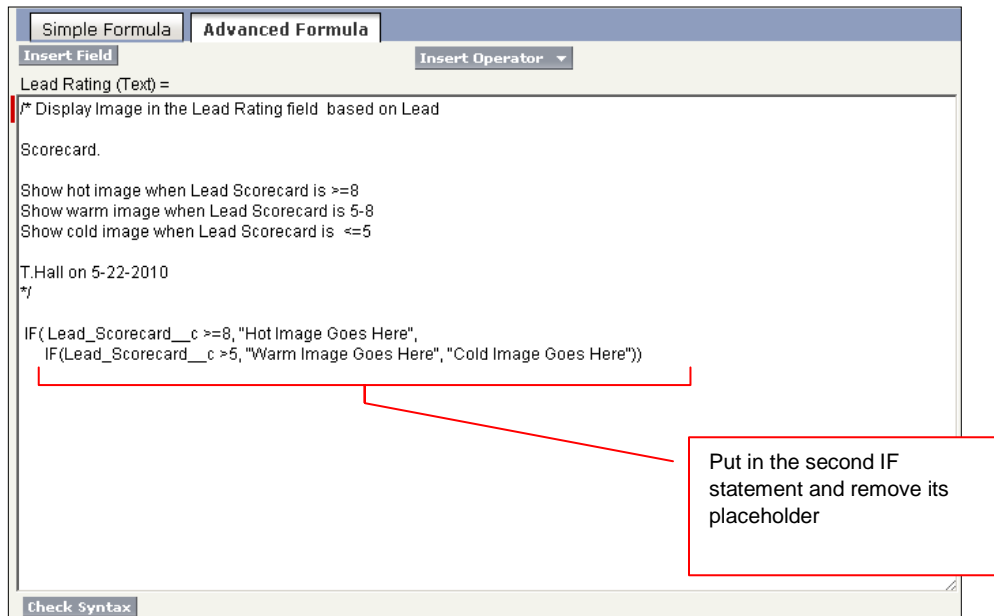
The formula works! Now all you have to do is add the IMAGE functions to display the graphics. Again, don't forget to check your formula by clicking Check Syntax.

4. Test your formula by changing the lead scorecard on a lead. See whether the images change from Hot, Warm, and Cold when you put in a lead scorecard of 8, 6, and 4 respectively.

Tip 3: Ask the Community

If you find you need help in creating a formula and want another opinion, check out the Force.com Discussion Board: Formulas & Validation Rules Discussion to see if someone has had a similar problem. If not, become a member of the developer community and post a question of your own.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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BP_CreateFormula_2010-08-19

# Choose the right tools to customize and extend Salesforce CRM

Salesforce CRM comes with an easy-to-use user interface, lots of features, a wide range of standard reports, and many ready-made extensions. But to get the most from your implementation, you'll want to customize your application so it works in a way that's right for your industry, your company, and your users.

For an individual user, that could mean tracking key accounts. For your company, it could mean changing the names of fields and tabs to reflect the terminology familiar to your users, creating custom reports that roll up information to suit your managers, or even creating new applications that extend the value of Salesforce CRM, such as a credit-checking application.

Abstract
Make the most of Salesforce CRM by customizing it to your needs.

Ranging from point-and-click tools to sophisticated development environments, there are tools for every need—and every level of technical expertise.

By Pat Cameron

There are several ways to adapt your application so it meets your business needs exactly. Each approach requires different technologies—and different skills. Here are the three main approaches:

1. Out-of-the-box configuration

2. Pre-developed enhancements and applications

3. Custom enhancements and applications

The figure below gives an overview of available tools and the skills needed to use them.
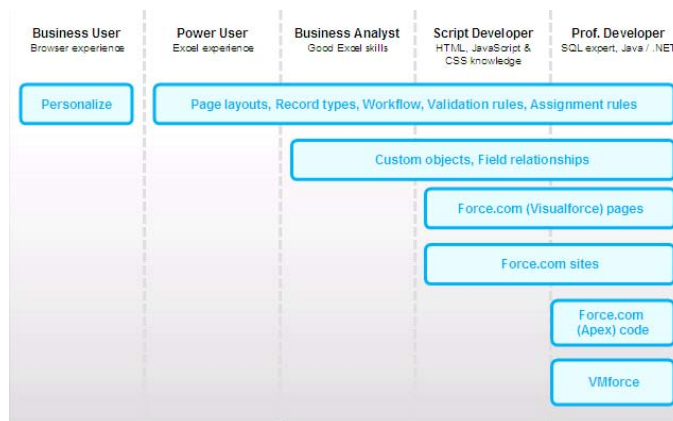
Note: General availability for VMforce is planned for 2011.

Approach #1: Use out-of-the-box configuration
Even non-technical users (with the appropriate permissions) can personalize the Salesforce CRM application, either for their own use or for everyone in the organization.

We call this approach "clicks, not code" because you can use it to configure various application building blocks—including the data model, the user interface, and the underlying business logic—without programming. For example, you can customize user interface components or use workflow tools to automate your business processes. And our security architecture already includes profiles with permissions, field-level security, sharing rules, and a role hierarchy.

With these tools, you can quickly respond to changing business requirements without technical skills that may be in short supply. In general, we recommend using the configuration options before creating custom code. Even experienced programmers can work faster than when coding from scratch.

Below are some tips to keep your configuration manageable over time:

- **Limit the number of profiles** – Profiles determine the user permissions for available functionality, including the partner and the customer portals. By setting up different profiles for various user groups such as end users, support users, and administrators, you can efficiently control user access. However, we recommend you limit the number of profiles that must be maintained.

- **Limit the number of sharing rules** – Use sharing rules to make automatic access exceptions for specific groups defined by your organization-wide defaults; for example, to allow greater access for particular users. Because sharing rules depend on role definitions (as well as public groups and queues), they tend to change over time. Again, we recommend keeping sharing rules to a minimum to avoid ongoing maintenance.

- **Limit the number of custom fields** – Use custom fields to capture key information for your business. We recommend you carefully evaluate the need for any given field and its benefits to various groups. Having too many custom fields can confuse users and lead to maintenance headaches.

> **"You can extend Salesforce CRM with hundreds of tools and custom applications available from the AppExchange."**

- **Limit the number of page layouts** – Page layouts can quickly grow out of control if not managed properly. Page layouts are useful for standardizing business across business units; therefore, be on the lookout for a large number of layouts—it can mean that units aren't using a standard process. The more layouts, the more work it is to respond to change requests.

   Note: Automation capabilities created with validation rules and assignment rules are generally kept in check by your process management's logical flow. Still, if you have a large numbers of automation rules you need to track how they influence each other.

To configure Salesforce CRM optimally, we recommend you train the users who'll have that responsibility. At the end of this paper, you'll find a list of training options.

Approach #2: Use pre-developed enhancements and applications

In addition to configuring Salesforce CRM, you can extend the application with hundreds of tools and custom applications available from the AppExchange, salesforce.com's online marketplace for cloud-based applications. For example, Force.com Labs created free dashboards—for sales, marketing, adoption, and service & support—that provide real-time snapshots of your business.

These apps were built by salesforce.com, individual developers, and salesforce.com partners. All are pre-integrated with the Force.com platform and certified to be secure. Some of these apps are free; others are available for a fee.

Users can use the AppExchange to browse for, test-drive, and install applications with no or minimal effort. In essence, it's an easy way to get features to enhance your application or get new applications without having to build them. Partners can use the AppExchange to make the apps they develop available to thousands of salesforce.com customers.

Here are some of the advantages of using the AppExchange:

- **Get missing functionality** – Get features to enhance your application—or get new applications—without having to build them. Most apps are ready to go, although some might need a little tweaking.

- **Extend the business benefits of Salesforce CRM to more of your departments and employees** – Take advantage of specialized applications developed by the "long tail" of the software development world to address your business needs beyond sales and customer service.

- **Leverage the integration power of native Internet technologies** – Partners can use Web services and service-oriented architectures (SOAs) to deliver virtual application suites for various business requirements across industries. Such suites offer better modularity and easier integration than traditional suites.

So check out the AppExchange to see what applications are available before developing your own. When considering available applications, just keep a few limitations in mind:

- **"Unmanaged" packages can't be upgraded** – The AppExchange includes both managed and unmanaged packages. Managed packages include support for all application components and can be upgraded. In contrast, unmanaged packages, which are usually free, can't be upgraded. However, they're useful as templates or basic building blocks for an application. They're also a great way to learn how to build on the platform.

- **Beware of object limits** – Applications may include custom objects or tabs that exceed your edition's object limit. Note that objects and tabs in "Aloha" apps don't count toward the limit.

- **Beware of edition requirements** – An application may include features not available for your edition.

Approach #3: Develop enhancements and applications

You can use the Force.com platform to develop, package, and instantly deploy applications, without any infrastructure. If you need an application that isn't already on the AppExchange—or if you want to customize beyond the capabilities of the configuration tools—the development tools on the Force.com platform are right for you.

Note: A study performed by IDC compared time, cost, quality, and ROI of application development on the Force.com platform compared to traditional on-premises platforms. The study found that application development required 76 percent less time—and companies could reduce their 3-year TCO by 54 percent, saving $560,000 per application. For details, see the IDC white paper "Force.com Cloud Platform Drives Huge Time to Market and Cost Savings."

Custom development on Force.com is well suited for data and process-centric applications for individual departments or across an enterprise. You can quickly build applications based on the following types of requirements on Force.com:

- Relational data

- Forms

- Reporting and analytics

- Workflow and approvals

- Call scripts and multi-step page flows

- Audit and compliance

- Data security and sharing

The remainder of this paper describes the tools for custom development on Force.com:

- **Force.com pages (Visualforce)** for creating flexible user interfaces and navigation

- **Force.com sites** for running your Intranet, corporate websites, or syndicated content on other websites

- **Force.com code (Apex)** for adding custom business logic to system events such as button clicks and record updates as well as general programming tasks that require close integration with Force.com platform services

- **Java with VMforce** (planned for general availability in 2011) for any kind of programming task.

Click here to find out how to get started on Force.com.

Developing custom user interfaces with Force.com pages (Visualforce)

With Force.com pages, you can create user interfaces (UIs) that look just like the standard Salesforce CRM user interface—or are completely different and unique to suit your company's needs. For example, you can create user interfaces for mobile devices, wizards, other multi-step processes, or data-specific rules. This flexibility can greatly improve adoption and ease of use.

Force.com pages is a component-based UI framework that extends standard Web technologies such as HTML, JavaScript, and CSS with markup tags that represent coarse- or fine-grained user interface components, such as a field or a section of a page. Force.com pages gives you pixel-level control of the UI while making it easy to bind it to the business logic, data model, and other Force.com platform services. Force.com pages includes more than 60 built-in components plus tools for creating custom components.

You'll need trained developers to use Force.com pages—both for developing the initial pages and for maintaining them—although anyone familiar with HTML may be able to fulfill standard requests.

Salesforce.com continues to enhance Force.com pages functionality. Note that, as of Winter '11, some aspects of standard Salesforce CRM page layouts—such as inline field editing on detail pages—are not yet supported in Force.com pages.

Developing data-driven websites with Force.com sites

With Force.com sites, you can create public websites and applications that integrate with your Salesforce organization, without requiring users to log in. As a result, you can display any information stored in Salesforce CRM on public websites.

Because any sites you build are hosted on Force.com servers, there is no data integration requirement. And because the sites are built natively with Force.com code, the application automatically validates any incoming data. You can also have users log in from your public site to a specialized portal, monitor bandwidth and request time usage for each site, track and display changes, and integrate with Google Analytics to track number of visits, page views, time spent on the site, and more. Click here for more information about Force.com sites functionality.

For ideas on what you can develop with Force.com sites, visit the Sites Gallery.

- **Create an ideas site** – Host a public forum for sharing and voting on topics related to your company or its products

- **Publish support FAQs** – Provide a public website where customers can search for solutions

- **Create a store locator tool** – Help customers find your stores in their areas

- **Publish an employee directory** – Add an employee directory to your company's intranet that's restricted by IP range

- **Create a recruiting website** – Post job openings and let visitors submit applications and resumes online

- **Publish a product catalog** – Display your company's products—including model numbers, current prices, and product images—by pulling them dynamically from your data

As you work with Force.com sites, be aware of these considerations:

- Public access permission settings control what public users can do on each site. Be sure to take extra precautions when setting these permissions, including access to standard and custom objects.

- Use login settings to let users register for and log in to your portal from your public Force.com site. Note that self-registration is available only for customer portals, not for partner portals.

- During your organization's maintenance for major releases your sites will be unavailable.

Developing custom business logic with Force.com code (Apex)

Force.com code is an object-oriented programming language with domain-specific classes and methods. It was designed to integrate tightly with the Force.com database layer and other platform services and to execute efficiently and safely in our multitenant cloud-based architecture.

Because Force.com code uses a familiar Java-like syntax, seasoned developers will get up to speed quickly. And because Force.com code supports the common stored procedure and database programming idioms, it's easy to write data-centric logic, such as triggers, that execute before or after records are inserted, updated, or deleted.

With Force.com code, you can:

- **Attach custom logic** to the fundamental database operations so that it executes whenever the operation executes, regardless of whether the operation originates in the UI or from the Web services API.

- **Modularize logic** into Force.com classes that can be called from other Force.com classes and triggers, to reuse and standardize code.

- **Expose Apex classes** as Web services that can be invoked from external systems, either publically or through secure access methods.

- **Create custom controller logic** that works in conjunction with Force.com pages to manage user interface behavior. For example, a Force.com controller can manage the flow from page to page in response to user input in a multi-step wizard.

- **Perform complex validations** across multiple objects. For example, if the user changes the stage on an opportunity, you can specify that the record must includes line items, at least one contact role, and at least one quote before the record can be saved.

- **Create complex business processes** not supported by workflow. For example, when a user creates a lead record, you may want to check for duplicate leads. If you find dupes, you can prevent the record from being saved.

- **Create custom transactional logic** (database operations that affect multiple objects as a logical unit of work, not just with a single record or object). For example, if you build a custom work-order process, you may want to check that all child work orders are completed before updating the parent work order.

- **Perform long-running calculations** or business processes in an asynchronous or batch execution mode. These operations run in the Force.com service and can be initiated on demand or scheduled to run on a recurring basis through a job scheduler.

- **Integrate with external Web services** using intuitive frameworks such as XMLStream, HTTP Classes, and WSDL2Apex.

- **Develop and execute test methods** alongside your business logic that ensure your code continues to work as intended throughout the entire life cycle.

Because Force.com code runs natively within Force.com and is tightly integrated with the Force.com platform, dependency information is maintained to ensure integrity when you change setup and compatibility with all future Salesforce CRM upgrades. As you work with Force.com code, be aware of a set of "governor limits" on certain operations. These limits were designed to ensure efficient and safe operation in our multitenant architecture. Be sure to familiarize yourself with the recommended best practices for coding solutions that scale within these limits.

Click here to find out more about Force.com code (Apex).

Develop Java with VMforce

In April 2010, salesforce.com and VMWare announced VMforce, a joint effort to enable Java and Spring-based applications to run on the Force.com cloud infrastructure. Planned for general availability in 2011, VMforce will let Java developers write Salesforce CRM extensions and custom applications using the popular Eclipse-based SpringSource Tool Suite (STS) development environment and then run them in the cloud.

VMforce will provide a rich set of APIs, services, and components to make it easy to access data in Force.com and leverage platform services ranging from full-text search, to analytics, to mobile access.

For customers with significant investments in Java software assets and development skills, VMforce will provide a compelling bridge that carries these investments forward while taking advantage of the capabilities of the Force.com cloud platform.

For more information, visit http://www.vmforce.com/

Available resources

Salesforce.com provides training and consulting resources to customize and extend Salesforce CRM.

Check out the following **training options** for administrators and developers on configuration tools and Force.com development tools. There's free virtual training as well as the following comprehensive courses:

- ADM201: Administration Essentials (5 days)

- ADM301: Advanced Administration (5 days)

- DEV401: Building Applications with Force.com (5 days)

- DEV531: Introduction to Object-Oriented Programming with Force.com Code (Apex) (5 days)

- DEV501: Force.com Code and Force.com Page Controllers (5 days)

4 questions to answer for a successful portal implementation

You decided to roll out a customer or partner portal. You're excited about improving your customer experience, making self-service possible, reducing channel conflict, and strengthening your online presence. So where do you start?

From our experience, customers who successfully implement a portal start by answering the following 4 questions:

1. How can we get it right the first time?

2. What are common roadblocks to avoid?

3. How can we offer more in our portal to increase its value?

4. How will we measure return on investment (ROI)?

Abstract

Rolling out a customer or partner portal involves careful planning and execution.

This document will help orient you before you dive into a portal implementation.

By: Jason Suen

As we take you through these questions, we'll share lessons learned from two customers—one of the largest open-source companies in the world, which implemented a partner portal, and a medical records management company that built a customer portal.

As with any technology project, the planning and preparation stage is often the most intensive and time-consuming. Investing in this stage will pay big dividends—you'll save time and ensure you reach your goals. Here are a few things to consider when you're at the whiteboard.

Question #1: How can we get it right the first time?

Getting it right requires that you involve the right people, clearly define your priorities, and supplement your own resources, if necessary.

- **Get the right people early on** – Building the project team should be the first order of business. Also make sure you have executive involvement from the start to help shape the vision. Use this vision to define your objectives, your priorities, and the metrics you'll use to measure success.

- **Define your priorities** – Be clear about what you want to accomplish. For example:
  - Do you have a target case resolution time?
  - Do you want to reduce the number of inbound customer service calls by 15%?
  - Are you looking to have partners contribute 30% of your overall revenue this year?

Defining such management-level metrics will help with creating your processes and building reports. These high-level metrics will be critical in defining your operational metrics, as discussed in "How will we measure ROI?" on the next page.

Best practice

- **Get the expertise you need** – Once your internal team is in place, make sure there are no gaps in your implementation expertise. You have several options—remote guidance or on-site support, delivered by Salesforce.com Consulting or our implementation partners. These organizations can help make sure you're on the right path from the start.

  Both of our example companies brought in consulting partners to make their projects successful. Prior to doing so, their progress was slowed by stalls and blunders. Both companies give substantial credit to on-site experts for their projects' success.

Question #2: What are common roadblocks to avoid?

Common challenges include complexity, managing change requests, training partners, and keeping up with what those partners want.

- **Keep access rules simple** – In most cases, less is more. Just as with your initial CRM rollout, determine the levels of user access, record types, and the custom fields and tabs you need.

  Initially, the software company mapped out the individual requirements and access needs for each partner as well as for the different access tiers of users at each reseller. The result was dozens of different partner profiles. As you can imagine, this approach was very complicated to implement and even more time-consuming to maintain. The company revisited that arrangement and turned dozens of profiles into a just a handful, without sacrificing the user experience.

- **Manage changes** – During the early pilot phases, there are bound to be dozens of updates, tweaks, and changes. It's a great opportunity for soliciting user feedback and making changes in an organized way. For example, you can use the ideas functionality of Salesforce CRM to solicit user feedback and vote on changes. And consider creating custom objects or a special case record type to log change requests.

  As you define your change request process, keep in mind that Salesforce CRM includes a **setup audit trail** to track changes made in your system. Go to *Setup | Security Controls | View Setup Audit Trail* to get started.

- **Train for high adoption** – Building a training plan for your partners—or public documentation for your customers—will bring adoption rewards. For more information about setting up a training plan, see the Best Practice document "10 tips for a successful training plan."

  One highlight of the software company's implementation was the creation of custom documents and training plans for its global partners. The company wanted to increase partner participation from 30% to 80%, which it achieved in just a few months. The company credits training, increased collaboration, and transparency for achieving these results.

- **Don't forget your users** – To continue your change management process, be sure to keep in touch with what users want. The medical records company used this approach with great success. By walking the halls and interviewing end users (both internal employees and customers), it gathered valuable feedback that helped reduce data input errors by 17% and case turnaround time by 15%. With that feedback, the company was able to improve the overall process as well as specific fields and page layouts that affect users every day.

Question #3: How can we extend the portal's value?

As you design your portal, don't forget about the hundreds of AppExchange applications—both free and for a fee—for virtually any area of your business. Looking for a survey tool? You can find a pre-built app to poll your customers about their portal experience. Want to create documents based on information your customers and partners provide? There's an app for almost anything you can think of.

The medical records company took advantage of partner apps to listen to its customers by integrating surveys into its portal. In addition, the company turned its portal into a revenue-generating machine by

using a payment processing app. Because apps from the AppExchange are pre-integrated, they're a fast and easy option to make your portal more valuable to your customers.

If you find yourself in uncharted waters with no existing apps, remember that the Force.com platform includes lots of tools to customize your app or build new apps. Check out [Developer Force](#) to find out just what you can do.

Question #4: How will we measure ROI?

After you roll out the portal, train your users, and enhance functionality based on user feedback and apps from the AppExchange, it's time to measure the results of your efforts. By using familiar dashboards, you can compare the initial metrics you defined with the data you capture as the portal is used.

To get accurate ROI numbers for your sales or customer service organization, establish performance benchmarks **before your implementation**. These benchmarks should reflect the priorities you outlined in your vision and in the planning stage, discussed on page 1.

Here are some common metrics for customer portals:

- Case resolution times, case age

- Cases closed per rep, # of self-closed cases

- Average case response time (time spent in New status)

- Cost per case ($ spent on portal support resources/number of cases resolved through portal)

- # of escalations

For partner portals, try these metrics:

- # of deals registered by partner

- Pipeline generated by partner

- Average age of deals by partner

- Closed business by partner

- Cost per partner (marketing support, funding requests)

Together with custom training and high-touch engagements, the software company used dashboards to help keep its partners on their toes. By using leaderboards that showed the comparative performance of its partners, the company met its goal of increasing channel sales from 40% to 60% of its total sales.
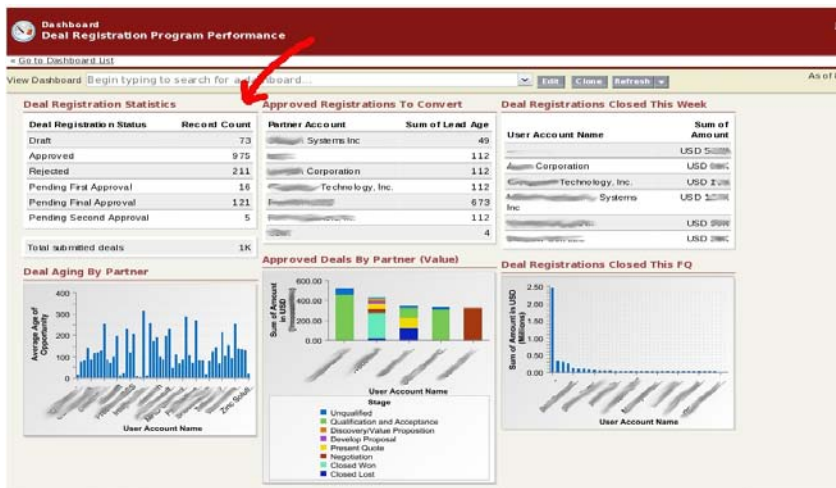
Summary and additional resources

For large projects such as portal implementations, getting started on the right foot and learning from other successful projects is critical. One way to accomplish that goal is to make sure you have the proper resources within your team—or getting help from salesforce.com or its partners. You'll find that you'll save time, money, and avoid having to re-implement areas that went wrong.

If you're ready to look into the finer points of implementing a portal, check out these resources:

- Customer Portal Implementation Guide

- PRM Learning Center, where you'll find a Getting Started guide, implementation tips, roles, and lots of PRM tricks

Create powerful Web sites on Force.com

Everyone loves great Web sites—and every company wants them. However, building and running such sites can be complicated and expensive. With Force.com sites functionality, you can build and run public, unauthenticated Web sites on the Force.com cloud platform. You don't have to worry about running a data center to host your servers or maintain multiple software applications. Plus, building applications on Force.com is 5 times faster, at about ½ the cost of traditional software platforms.

By using the Force.com pages functionality and leveraging the data in your Salesforce account, you can build sites users can access through a custom Web address known as a custom domain. This document describes common use cases for the sites functionality, the skills needed to build them, and best practices and considerations.

Abstract
Use Force.com sites functionality to build and run public, unauthenticated Web sites on the Force.com cloud platform. Learn about common use cases, needed skills, and considerations.

By Alexis Segars

Build your own sites: Use cases

Some types of sites are well suited for Force.com sites capabilities, but others are not as good a fit. Here are some common use cases:

- **Corporate or intranet Web sites** that display information to visitors. Such sites are the easiest to build, even with limited HTML knowledge. You can use the free CMSForce content management application from the AppExchange to help build your pages. These sites are the easiest to create and only contain static pages. However, they're not as flexible as the example sites below.

- **Store locators or product catalogs** that capture or push information to your visitors. Because such interactive sites leverage Force.com pages functionality and Force.com code (Apex), they're more flexible, but you'll need a developer or your IT department to build them.

- **Insurance applications or event management applications** that integrate with your Salesforce account. Such sites not only to capture or push information to visitors, but bring data into the application. For example, when your visitors fill out applications or sign up for events, that information is automatically pushed into Salesforce CRM. Because building such sites uses the pages functionality and Force.com code, you'll need development resources.

For examples of such Web sites, please visit the Sites Gallery.

Other types of sites are not a good fit for the sites functionality, including sites with heavy bandwitdh requirements. Because such sites use large file uploads, downloads, or require heavy processing, which make them bump up against daily bandwidth limits, they're not good candidates.

For more information about these limits, please view the Sites Best Practices page.

Best practices and considerations

When building sites on Force.com, keep the following considerations in mind:

- **Content** – Because your sites will be available to the public, don't publish anything inappropriate or confidential.

- **Testing** – Test your site for every type of visitor and any kind of demand. Although your site may perform well on a test with 10 people, it could fail if thousands visit. Also, test different browsers to ensure all visitors have the same experience.

- **Performance and daily limits** – Salesforce.com imposes some limits on your sites pages. Make sure you're aware of these limits so your visitors' experience is not degraded by poor performance. Refer to the Caching, Performance, and Daily Limits page for more information.

- **Schema design** – This design influences database management and information retrieval. Well-written queries and careful schema design are key for top performance, especially for high-traffic sites. Also consider indexing your design schema to optimize data retrieval.

- **Site design** – When building your site, take into account whether you're porting an existing site or building a new site. Porting existing sites may affect the site's appearance.

- **Web authentication** – If you need password protection or visitor authentication, build your site using a customer or partner portal to prevent access to protected content.

Additional resources

For additional considerations, best practices, and information about Force.com, please review the following resources:

- Introduction to Sites
- *Implementation Guide*
- *Force.com Cookbook*
- Developerforce Sites page
- CMSForce: Native Force.com Content Management Application

5 steps to using the content library

Make sure everyone in your organization always has the latest sales presentations, collateral, and other documents right at their fingertips. The content library license is included in all editions at no additional cost. As the administrator, you can control how users can take advantage of this feature in your organization.

To get up and running with the content library, make sure it is enabled for your organization, using the options from **Setup ➤ Customize ➤ Salesforce CRM Content ➤ Settings.** Then follow these five steps:

1. Create workspaces and workspace permissions
2. Organize materials
3. Integrate with other Salesforce applications
4. Migrate content
5. Launch your content

Abstract

Want to go beyond simply finding documents? Would you like to collaborate with other business areas? And wouldn't it be great to make the most of your institutional knowledge by sharing content?

Follow these recommendations to set you up for success as you roll out the content library.

By Andi Miachels

Step 1: Create workspaces and workspace permissions

Workspaces determine who can access documents, and workspace permissions determine who can do what to those documents. As you get started with the content library for your organization, define the following information for workspaces:

- **Determine the number of workspaces** – Create as many workspaces as you need and organize them based on any classification, such as department name, job function, or team. You can also set up content to be owned by a single workspace but shared with multiple workspaces.

- **Set workspace permissions** – You can define any permissions you want each workspace member to have in addition to simply viewing content. When you define user permissions, it's key to balance content access with security considerations.

- **Start with a "Sales Content" workspace** – Use this workspace to store official sales materials and give marketing and sales operations users "author" permissions. Sales representatives should have "view" (and potentially "comment/tag") permission. If your organization uses Google Docs, encourage workspace members to add their Google docs to a workspace.

- **Add a second "Marketing" or "Sales Collaboration" workspace** – Give marketing a "draft room" to collaborate on materials before sharing them with the sales team. And let that team share its own informal materials, such as RFP responses.

- **Enable groups** – To simplify user administration, use existing public groups or create new groups using your company's role hierarchy. Add individual users as needed and decide which users or groups can see what content.

Step 2: Organize materials

Streamline the user experience of searching and navigating by clearly defining tagging rules, consistently classifying content, and creating custom fields and content types that are relevant to your organization.

- **Determine what types of tags make sense for your organization** – You can use open, guided, or restricted tagging:

  - **Open tagging** – Lets users enter any tags they want

  - **Guiding tagging** – You suggest tags to choose from or let users add their own

  - **Restricted tagging** – Lets users choose only from the suggested (guided) tags

In general, avoid using too many tags. Because the search engine will help users find specific content and because tags help users browse and subscribe, excessive tagging will create confusion.

- **Ensure content is classified consistently** – Work with your contributors to define consistent tag names. By establishing tag names from the outset, you can avoid tags such as "channel" and "channels" in the same workspace.

- **Create custom fields and content types –** You can use content types to manage multiple custom fields to represent different types of content. Think of content types as "record types for documents."

  You can define which content types can be used in each workspace. Use the standard fields for basic organization: Author, File Type, Tag, Workspace, and any custom fields relevant to your business or business process. If you use the Related Content lists on Salesforce objects, align your custom content fields with the standard and custom fields on the objects to increase the accuracy of a "find content" search.

Step 3: Integrate the content library with other Salesforce applications

When you integrate the content library with other applications, users won't have to change applications to get their work done.

- **Provide access to the content library from other applications –** Expose selected content tabs in other applications to make it easy for users to find content from any application.

- **Recommend content based on record data –** You can suggest relevant content based on specific fields on commonly used Salesforce objects. As a result, you'll eliminate the need to search for content when reps have already given you key information and also improve the chances of their using the right information.

- **Associate content with specific records –** You can link files as you publish them to records in Salesforce as long as those files consist of generic content that's not private to a record. Be sure to establish logical connections between data and documents, such as campaigns and any underlying assets. In addition, be sure to align your categorization model in the content library with your data model in CRM and other areas.

Step 4: Migrate existing content

When you move materials into the content library, take the opportunity to "clean house" and determine what materials to keep, who should own the materials moving forward, and how the materials fit into the new classification structure.

■ **Follow these steps for your migration plan:**

1. Create an inventory of all existing content

2. Remove outdated materials and identify new content owners

3. Develop a "straw man" approach to organizing content

4. Upload a sample piece of content for end users to test

5. Complete the final migration

Step 5: Launch content to your organization

A well-designed rollout is your key to success, so be sure to cover all your bases in advance:

■ **Confirm sponsorship, training, and tactics** – It's crucial to get the support of your executives so they can put their weight behind the rollout. Once you have executive sponsorship, train your users to help them see the value of the application and become productive quickly. Also, use the right combination of "carrots" and "sticks" to drive usage.

■ **Highlight valuable content -** To highlight valuable content and make it easier to find, mark it as "featured" on the content details page. Featured content is assigned a higher priority in search results than similar content and it appears on the Workspaces tab for easy access. To use this feature, be sure to check the Feature Content option when you set up users' workspace permissions.

For More Information

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8 keys to mobile CRM success

Giving your field sales, service, and executive teams mobile access to Salesforce is one of the easiest ways for your team to get instant, added value from Salesforce. You'll boost productivity, improve data quality, and help make sure that being out of the office doesn't mean being out of the loop.

What's the best approach for getting your people, your processes, and your devices ready to go mobile? To start, it's important to know salesforce.com has two mobile products: Salesforce's mobile capabilities for your CRM needs and soon, Chatter Mobile for collaboration. Follow these 8 tips and you'll be well on your way to mobile success.

Abstract

Mobile access to Salesforce is one of easiest ways to get the most from your Salesforce investment.

To get started right, follow the tips in this document. It's an approach that's yielded great results for hundreds of customers.

By: Joshua Schneyer

1. **Leverage mobile collaboration (Chatter Mobile)** – The rise of social networking Web sites like Facebook and Twitter have changed the way users access information, and this shift is rapidly extending to the enterprise. Products like Salesforce Chatter give enterprise users a way to share and follow relevant people and records in an environment that's trusted and secure. Mobile access to one's "feed" is key to keeping employees across the organization continually informed and productive no matter where they go.

2. **Use newer devices** – Whenever possible, give your team the latest mobile devices. Salesforce CRM's mobile functionality supports the most current iPhone and BlackBerry® devices. Once available, Chatter Mobile will also work on iPad and Android devices. If you're not sure whether your device is supported, consult our supported devices list. Or download our mobile apps to test on your device.

3. **Identify key mobile use cases (the Sales Cloud's mobile capabilities)** – You've put lots of thought into customizing your core business processes to meet your organization's needs. Why should your mobile solution be different? Before you get started, identify clear and simple mobile use cases with obvious benefits. Start by defining tasks and processes your users will need in the field, such as:

   - Logging phone calls, emails, and visits on the fly

   - Processing orders or updating customer cases in real time

   - Accessing content in Salesforce like presentations or brochures and forwarding them to customers

   Consider running a quick pilot on easy-to-deploy Mobile Lite for useful insight about which mobile use cases are key to your business.

4. **Less is more (the Sales Cloud's mobile capabilities)** – Mobile users rarely need access to *all* the data and features in Salesforce. Be selective about which applications and data you make available. Users on the go tend to use a small subset of data and repeat the same tasks over and over, such as logging calls and emails and updating opportunities or cases that relate to their territories.

Limit available data fields to what's relevant for certain users and avoid the common trap of downloading every record a user might need. Instead, use the application's intelligent filtering capabilities to store only relevant records on the device at any given time.

5. **Train your users –** As with any new application, it's important to show users how to use it—and how they'll benefit. Ask users to watch the Getting Started with Mobile Access videos or attend training before giving them mobile access.

6. **Choose the right version (the Sales Cloud's mobile capabilities) –** Salesforce offers two mobile versions: Mobile Lite, which is free across all editions, and the full version, which is free for Salesforce CRM Unlimited Edition users (or available via an add-on license for other editions).

   - If your users only need **basic mobile access** to standard tabs like Contacts, Leads, and Opportunities, try Mobile Lite. It's free and you can enable it for your org with one click.

   - If your mobile use cases include use of custom objects, Force.com pages (Visualforce), or third-party apps from the AppExchange, you'll probably want to use the full version of mobile.

   - Different users have different needs. Consider a hybrid approach where mobile users with advanced needs are set up on the full version and those with basic needs receive Mobile Lite.

7. **Work with your IT department** – Be sure to work with your IT department to accommodate restrictions or requirements related to mobile devices. For example, if your BlackBerry devices connect through your corporate firewall, there may be security and communications requirements.

8. **Take advantage of our resources** – Mobile access to Salesforce can become one of your most powerful business tools, but there are a few extra moving parts. Salesforce.com provides a range of free resources to jump-start your mobile deployment, including live Q&A Webinars, how-to videos, implementation guides, and tip sheets. To get started, check out these resources:

   - Mobile for the Sales Cloud Web site

   - Getting Started with Mobile video

   - Mobile Community blog

   - Supported Devices list

   Of course, feel free to contact your account team for recommendations for your specific needs.

Summary

Mobile access to Salesforce is one of easiest ways to enhance the value of your Salesforce investment. Before you start, have clear goals that define what you want people to be able to do from the field. For the best performance, make sure you have newer mobile devices. To prepare, define clear use cases and train your users. As you roll out mobile features, start with a standard configuration (Mobile Lite) and improve the application based on user feedback as you expand access and capabilities. Consider providing all employees—not just those working outside the office—with mobile access to Chatter for enhanced, real-time collaboration and communication. Finally, be sure to take advantage of the resources provided by salesforce.com.

For More Information

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3 steps to managing members and donations with Salesforce CRM

Although donations and members are the lifeblood of your organization, it's often hard to know much about them. Knowing your members and keeping critical information about your relationships with them in a single place helps get those critical donations—and grow healthier and deeper relationships.

With the tools in Salesforce CRM, you can quickly boost membership development and donations. For example, by generating reports based on donation history, you can create targeted campaigns to reach out to at-risk members. 211 San Diego, an organization that provides referrals to more than 5,000 health and service programs in the community, credits raising $600,000 to the ability to track donations and improve communications with Salesforce CRM.

Abstract
Find out how to enhance your fundraising campaigns and build stronger relationships with your members.

By Lindsey Anderson

This document covers the 3 steps to using Salesforce CRM to increase the sophistication of your fundraising activities and member management, without a significant investment:

1. Prepare for success
2. Get up and running
3. Step it up

Step 1: Prepare for success

When we asked our most successful nonprofits what they did right, they said it was the up-front investment in planning that made all the difference. Your Salesforce CRM implementation will grow and evolve over time, but planning will always be the critical backbone that ensures your success.

- **Review your process** – Can you clearly describe your process for getting new members? Do you know and track all your donation sources? Have you identified what information you want to give to your members—and when? It's important that you clearly understand these processes so you can duplicate them in Salesforce CRM. Use this guide to map your processes to prepare for using Salesforce CRM to step up your fundraising.

- **Clean your data** – Before you think about mass emailing those contacts that have been in your Excel spreadsheets for years, get rid of all those duplicates. Your relationships can only be as good as the data you have about your contacts. Check out the tools on the AppExchange to clean up your data, such as DemandTools, which discounts its products for nonprofit organizations.

- **Keep it simple** – Start with just the fields you need and identify new fields and processes as you become familiar with the application. Start with the basics—Donation amount, Stage, and Posting date are critical information you'll want to track. You can add other fields in the future. The fewer hoops that are needed to log a donation or inform a member about a capital campaign, the more likely it is your members and users will adopt the process. More sophisticated uses will become obvious as your organization evolves.

Step 2: Get up and running

This section describes the standard tools you can use to improve the results of your fundraising and relationship-building efforts. You can find more information about them in Help & Training.

- **Dashboards and reports** – To get started, use standard reports such as the LYBUNT and SYBUNT reports included in the Nonprofit Starter Pack. You can also use the report wizard to create custom reports to track your donations, both over time and in relationship to specific goals. Once you have the reports you need, don't forget to save them to a folder and make that folder accessible to the people who need the reports.

- **Campaigns** – Campaigns help identify the people you want to reach and then track the results of your appeals. Campaigns can take many forms, from targeted email solicitations to invitations to events. You can create targeted campaigns based on various attributes so you can customize your appeals based on donation trends, geographical location, or membership type. By linking prospects to campaigns you can track prospects over time, using customized campaign member status values. Campaigns can also help determine how effective various activities are in reaching your goals.

- **Opportunity and donation stages** – The donation object (record) is the standard opportunity object, renamed for nonprofit organizations. This object includes a Stage field for tracking long-term membership and donation trends and sending out targeted communications based on the stage. You can also assign specific activities for your staff to follow up and create a complete record of all activities associated with a donation or pledge.

- **Email templates** – Once you set up segmented campaigns with different goals, you can customize your email templates to send inexpensive, focused communications to the people targeted in each campaign. Use the merge fields to make these communications more personal and add attachments such as your annual report to remind donors of your mission. For more information about setting up email templates, see the Best Practice "Turbo-charge customer communications with email templates."

  If Salesforce CRM's daily email limits (1,000 emails per day per user or 2,000 per account) aren't enough, explore the mass email marketing tools available on the AppExchange, such as Vertical Response.

Step 3: Get a sponsor

After you define your processes and start using the standard tools, review what's working, what isn't, and what else you'd like to do. Then check out the following resources to extend your success in your fundraising and membership activities.

- **Browse the AppExchange** – You'll find a number of tools that can dramatically increase the effectiveness of your fundraising, including the donated and discounted applications available to nonprofits. Ranging from e-commerce solutions you can use to integrate online donations into your Salesforce CRM account to apps that let you customize direct mailings from Salesforce CRM, these solutions can be the secret sauce of your fundraising success. CongaMerge, eGiving, and Vertical Response all focus on various aspects of the fundraising process.

- **Consider a partner** – As your fundraising success with Salesforce CRM grows, so will your needs. Be sure to explore our partners with the expertise to manage complex fundraising efforts with additional tools built on the Force.com cloud platform.

- **Review your processes** – Once you have a sophisticated donor platform, remember that one of the biggest perks of Salesforce CRM is its flexibility. Be sure to periodically schedule time to review and evaluate your processes, campaigns, and reports. Innovating as you go will help you build a stronger donor and member community.

Summary

By creating innovative, flexible, and familiar donation and member management processes in Salesforce CRM, you'll increase your ability to achieve your mission. Here are some additional resources to help you become even more effective:

- Check out this session that showcases best practices in donor and member management.

- Get connected with other nonprofit users who manage their donations and members in Salesforce CRM.

- Review these videos to learn more about specific fundraising examples you can manage in Salesforce CRM, using the Nonprofit Starter Pack.

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Bring cloud computing to your entire company with the AppExchange

Welcome to the AppExchange, the world's first marketplace for business applications that run in the cloud. It's been called the "eBay of business software" by *Forbes* magazine because it brings application sellers and buyers together.

If you're a developer or a company that builds cloud computing applications delivered as a service, the AppExchange lets you reach thousands of potential customers and benefit from salesforce.com's reach and resources. You can make any applications you create available on the AppExchange for free.

Abstract

With hundreds of applications—ranging from dashboards that extend Salesforce CRM to full-featured Financials applications—salesforce.com's AppExchange makes finding and deploying new applications fast, easy, and secure.

By: Sara Varni Bright

If you're a customer, you can use the AppExchange to expand the functionality of Salesforce CRM, with popular applications to integrate your campaigns with keyword marketing, email and direct mail solutions, and contract and proposal management, to name just a few. But that's not all. Many of the solutions on the AppExchange are enterprise-grade apps that go far beyond CRM. These applications bring the benefits of cloud computing to all departments in your company, including finance, HR, and IT. Many of these apps are free, others are fee-based. All of them give you the benefits of cloud computing.

What's different about the AppExchange?

To answer that question, consider the traditional process of selecting a new business application. First, you research available apps in publications and at trade shows. Then you narrow down the pool of potential vendors. You create an RFP, send it out, and evaluate the responses. You invite the short list of vendors to give demonstrations. You do a pilot and, with luck, the pilot is successful and you license the software and start the implementation process.

Compare that process to getting apps from the AppExchange, where everything you need to discover, evaluate, and test applications is in one place. You can compare available apps side by side. See what other customers say about them. Try them out. And then install them with a few clicks and you're ready to go. This paper describes the 5 steps to getting apps for your business needs.
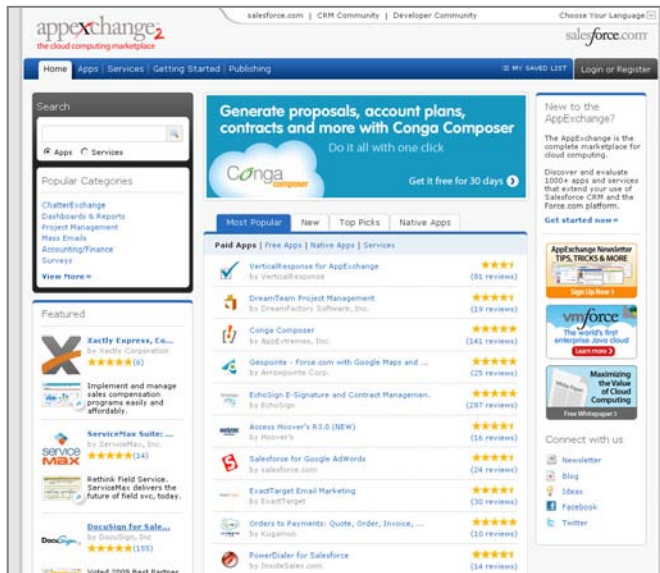
Step 1: Discover

The AppExchange makes it easy to find and evaluate applications. You can search for apps by keyword or browse various categories, including native apps built on the Force.com platform, the most popular apps, newly added apps, and apps our staff particularly likes. You can also save up to 3 apps to create a side-by-side summary of important features for easy comparison. Forget exactly how you found an app? The Recently Viewed Apps area makes it easy to find it again. Want more? The Apps tab further categorizes apps by type, industry, and other attributes such as whether the apps are free or fee based, how they rated, whether they're supported, and so on.

Step 2: Evaluate

There are three steps to evaluating an app: finding out all you can about it, trying it yourself, and possibly getting advice.

The AppExchange makes the first two steps easy. First, you can display a summary of any app for important information at a glance. You can even display up to 3 summaries side by side for easy comparison. You can also play demos, view screenshots, get technical details, and read customer reviews to benefit from the experience of other customers. Then try it yourself—just click the Test Drive button. Finally, talk to your account executive or Customer Success Manager (CSM) to get their recommendations.

Step 3: Customize

An important key to the success of any kind of application is user adoption. The key to user adoption, in turn, is making sure the application works the way your users do. Adjusting the application to the needs of your users typically requires changes to the user interface, such as deleting unnecessary fields, changing field names, or adding tabs.

Making such changes is easy with salesforce.com's point-and-click tools. One great thing about customizations: Unlike with traditional on-premises software, your customizations aren't lost during upgrades or new releases. Note that the same limits that apply to your edition—such as the number of custom objects you can have—apply to any apps you install from the AppExchange.

Step 4: Integrate

Integration—making different applications work together and share data—has been one of the biggest challenges in IT. Because all apps on the AppExchange are pre-integrated with Salesforce CRM, there are no integration issues. Instead, your new apps simply work. What's more, just as with customizations, you'll never have to recode integrations with new releases.

Step 5: Deploy

One of the benefits of the cloud is that deploying apps doesn't require a massive IT rollout, with the need to configure individual machines, upgrades, and versions. As with Salesforce CRM, the IT infrastructure is taken care of. And for apps that were built on and run on the Force.com platform, you also get the same performance and reliability.

In Salesforce CRM, every org is ready for apps from the AppExchange. Although anyone can try an AppExchange app, installation is limited to Salesforce CRM administrators, who are trained on the security aspects of deploying new applications. We suggest that you download apps to a production or sandbox environment before making them available to all users. We also recommend that you train your users on how to get the most from your new app.

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6 steps toward top data quality

Industry analysts point the finger at bad data as one of the top three reasons why CRM projects fail. Because bad data leads to misleading, incomplete, and confusing information, it lowers adoption—another major reason why CRM projects fail.

Accurate information and reports are the life blood of an effective sales force. Without it, management doesn't have the data to make good decisions, sales reps don't have the tools to turn leads into customers, and the company will find it difficult to reconcile CRM data with data in other systems. The result? Lost opportunities and revenue, frustrated users and customers, and a lack of user adoption.

Abstract
Don't let bad data undermine your Salesforce CRM project—or your success as a company. Get your data under control with the 6-step approach outlined in this paper.

By: Oliver Demuth

How to boost data quality

To ensure consistently high data quality, you'll need to train your users, create and implement a data-quality process, and use available technologies to automate the process whenever possible. Here's a 6-step approach that's working for many of our customers.

Step 1: Profile your data

Data profiling is all about understanding your data. You should know where your data comes from: spreadsheets, backend systems, or sticky notes all over reps' desks. Take an inventory of your data that includes the following information:

- List your data sources and the names of the fields in which data is stored.

- Note any potential problems with your data. Do you have automated quality checks before a new record can be saved? Are all fields mapped correctly? For example, the information in the Company field in Microsoft applications usually belongs in the Account field in Salesforce CRM.

- In Salesforce CRM, make sure there's no duplicate information between objects (such as Accounts, Opportunities, and Contacts) and fields (such as State, City, and so on).

Step 2: Control your data

Data control is about achieving data accuracy *and* ensuring the right users have access to the right information, which also means blocking access, as needed. To control your data, you first need to "clean" it by removing duplicates and errors, and then set up processes and use technologies to keep it clean.

- Use automated routines or tools to clean your data. You'll find several of these tools on the AppExchange.

- Prioritize your data cleanup effort. First, fix data that's highly visibly and frequently used, such as addresses and emails. Fix business-specific information next, such as Opportunity types and stages. Finally, remove any duplicate fields; for example, don't repeat Account information in the Contact object.

- Get your users to fix their data. You can help by using Salesforce CRM's validation rules to alert users when data records are incomplete or don't conform to data-quality standards.

- Use exception reports and data-quality dashboards to remind users when their Accounts and Contacts are incorrect or incomplete. Scheduling a Dashboard Refresh and sending that information to managers is a great way to encourage compliance.

Another data-control challenge is making sure that data ownership and sharing works for your organizational structure.

- Review your profiles and role hierarchy and make sure the hierarchy, teams, and groups are kept up to date.

- Meet frequently with management to keep up with organizational changes.

- Define the Create, Read, Update, and Delete (CRUD) rights for each profile to ensure users can work with data, as needed.

Step 3: Integrate your data

Most organizations have data in more than one system. Whenever there's duplicated data in several systems, it's easy for information to get out of synch. One way to avoid this problem is to integrate your systems so that updates in one system automatically update the others, resulting in a single source of "truth" and making it easier for end users to access information.

- Integration was once a huge headache. No more. Salesforce.com offers native connectors to Oracle and SAP systems for easy integration of customer-master records. And the Force.com API can be used for any integration scenario. There are also dozens of integration partners ready to help with any integration need.

- It's easy to learn about and access the Salesforce CRM data model with our Web Services API Developers Guide.

- When designing your integration, evaluate your business applications to determine which one will serve as your system of record (or "master") for the synchronization process. The system of record can be a different system for different business processes.

- Integrate your order entry and fulfillment applications with Salesforce CRM for a 360-degree view of your customers.

Step 4: Augment your data

To make your CRM system even more valuable, augment your data with information that will give your salespeople and managers an edge. For example, a number of third-party organizations such as Dun & Bradstreet and Hoover's provide valuable information your reps can use to prepare for sales calls. Also make the most of internal market intelligence, such as purchasing patterns or competitive analyses.

- To understand what data is valuable, survey your sales and marketing users to see what they want the most.

- Check the AppExchange to find partner solutions that can augment your data with external information.

- Get internal information about your customers' behavior and buying patterns. Then evaluate whether this information would be helpful to your reps.

Step 5: Monitor your data

Achieving high-quality data isn't a one-shot effort, but requires ongoing vigilance. Establishing policies, processes, and tools for monitoring data is crucial to maintaining data quality.

- Define a centralized process for mass data loads and data-cleansing projects. Both the Force.com platform and the AppExchange have tools that can help with importing and cleansing data.

- Use Workflow, Validation Rules, and Force.com code (Apex) to enforce critical business processes.

- Create reports and dashboards to monitor data quality. Be sure to leverage free data-quality dashboards available on the AppExchange. By making data quality widely visible, you help make it everyone's responsibility.

Step 6: Assign ownership, train users, and commit to a data-quality process

Users need to know the importance of data integrity and how to do their part in any data-quality initiative. In training users, show them how data quality directly affects their work. It's also a good idea to assign ultimate responsibility for each region's data to a super user, geographic lead, or other business owner.

The Bottom Line

Bad data is bad for business. Achieving and maintaining high-quality data requires vigilance, good processes, and a little help from technology—including the features in Salesforce CRM, tools from the Force.com platform, and solutions from our partners on the AppExchange.

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Tips for using incentives and rewards to boost adoption

How can you get users onboard with Salesforce CRM? How can you get them to realize its value and encourage them to use it? Try incentive and reward programs—they're a proven way to engage and motivate people. Incentives can take different forms, including recognition, cash, points, or actual rewards. For example, one customer gives away iPhones to the strongest adopters each quarter. Another hands out monthly Starbucks coffee cards to those who convert the most leads.

Abstract

User adoption is key to making Salesforce CRM a success. To ensure high rates of user adoption you need a long-term strategy, with ongoing efforts to drive adoption.

Find out how to make incentives and rewards part of *your* adoption strategy.

By: Nancye Michaelian

- **Measure usage** – Before you can reward usage, you need to know who's doing what, how often, and how well. To get that information, go to the AppExchange and download some of the free adoption dashboards created by salesforce.com. The most popular of these are the adoption dashboards and a sales activity dashboard.

- **Tie compensation to usage** – One of the strongest measures to boost adoption is to tie usage to compensation. Build use of Salesforce CRM into your job descriptions and performance evaluations. And adopt the mantra, "If it's not in Salesforce CRM, it doesn't exist." It's an easy way to make sure user behavior aligns with your business objectives.

- **Ensure data quality** – In addition to requiring that users enter data into Salesforce CRM, be specific about both timeliness and quality. For example, reps should enter prospects and early-stage opportunities immediately, rather than waiting until just before closing a deal to enter data. Use picklists and validation rules to enforce these standards. You can also use the free data quality analysis dashboards to analyze the quality of the data your team enters.

- **Make adoption fun** – Decide what behavior you want to reward most—such as proposals or on-site demos—and then reward the top performers as part of a game or contest.

  - **Create a reward points program** – One way of encouraging and tracking progress is to give people points. For example, a 90 percent login rate for the month could earn 10 points. Users can cash in accumulated points on a special Web site (www.incentivemarketing.org/). Or start by giving users a certain numbers of points and then subtracting points when they do something wrong, such as not entering required information.

  - **Monthly newsletters** – Start a monthly newsletter with tips that reinforce your business processes and highlight success stories. You could include a quiz—for example, have users guess who has the largest pipeline this quarter, what campaign generated the most revenue, and so on. Get it right and get a prize.

- **Make a game of it –** Because your implementation is a work in progress, it's important to keep users engaged. A great way to do that is to make training creative and fun with games such as Tic Tac Toe (divide into teams and ask questions about functionality until someone wins), Jeopardy (create categories on different topics, divide into groups of 2 or 3, highest points win), and Poker Hand (get a card for asking and answering questions … the best poker hand wins the pot).

- **Engage the team spirit** – Break user groups into teams and have them meet at regular intervals (for example, quarterly) to get their feedback and suggestions. Use the application's ideas or cases functionality to track feedback and then let your admin judge the best ideas. The winning team gets dinner, tickets to sporting events, or something similar.

- **Reward mentorship** – Assign team mentors, then reward the mentors of those teams that get good results. Try lunches with the executives, where they can get visibility for themselves and their teams.

- **Use peer pressure** – Let's face it—sometimes rewards just don't do the trick. In such cases, you can use disincentives to get people to comply. For example, a "wall of fame–wall of shame" page, which highlights those at the top and bottom of the leader board, can be a strong motivational tool. A real-life example of this approach comes from a customer who created a dashboard called "Clean Your Room" to discourage negligence such as stuck opportunities, pushed opportunities, and accounts with no recent activity.

Beyond login rates: three key areas for measuring adoption

Now that your Salesforce CRM application is implemented and set up for your business needs, it's time for your users to dive in and start using it. But how do you know if your users are really getting the most from Salesforce CRM? The best way to tell is to proactively measure adoption rates.

Tracking user logins is a good start, but it's not enough. Because it can be confusing to figure out what to measure, you need to develop a framework of key performance indicators (KPIs). To come up with these metrics, we recommend involving key stakeholders—managers, senior managers, and executives—to determine KPIs based on business benefits and desired process performance. If you don't define and regularly monitor KPIs by incorporating the reports and dashboard features in Salesforce CRM, you may find that adoption, consistent usage, and data quality will suffer.

If you haven't done so already, check out the AppExchange for adoption dashboards to track login activity and new records added by users.

Abstract
User adoption is key to making Salesforce CRM successful. To make sure you stay on track, you need to be proactive about measuring adoption. This document outlines three key areas for measuring user adoption.

By: Matt Jadhav

Choosing adoption metrics

Consider these three key areas when choosing metrics to measure user adoption:

1. Usage
2. Data quality
3. Business performance

1. Usage

Your first measurement of adoption—and a basic indicator of success—is login rates. You also need to ensure that users are actively and consistently updating data and creating new contacts, opportunities, and/or cases, depending on their roles in the organization.

Below is a list of suggested baseline metrics to track usage. Which metrics to use and how often to track them depends on your unique requirements, but we've provided some guidelines to get you started:

Usage metric	Frequency
Users logged in – last 7 days	Weekly
Users not logged in by last name – last 7 days	Weekly
Users never logged in	Weekly
Accounts created by owner role – last 120 days	Monthly
Opportunities created by owner role – last 60 days	Monthly
Contacts created by owner role – last 120 days	Monthly
Activities completed – last 60 days	Monthly
Accounts last modified by owner – last 120 days	Monthly
Neglected opportunities by role – next 60 days	Monthly
Open tasks by assigned role – current and previous	Quarterly

2. Data quality

Data quality is a valuable metric for measuring adoption. Looking at critical fields and making sure users complete them correctly is important. If certain fields are not filled out, or are filled out incorrectly, it may compromise user adoption. Designing a protocol to ensure users fill out all fields in a consistent and accurate manner creates strong data integrity and reliability, which translates into higher user confidence and adoption.

Below is a list of suggested baseline metrics to get you started in tracking data quality:

Data quality metric	Frequency
Opportunities with a close date – last 60 days	Monthly
Stage opportunities are entered	Monthly
Prospect accounts missing # employees – last 60 days	Monthly
Lead rating on converted leads	Monthly
Accounts with all key fields populated	Monthly
Accounts missing rating field	Monthly
Key, non-required fields filled out	Monthly

3. Business performance

Usage should also reflect business performance and compliance. Ensure that your users are not just logged in, but are using the application in a way that enhances business effectiveness. For example, measuring the types of calls, as well as the level at which calls actually close the deal, is more effective than just measuring the number of calls. You should also build analytics that will uncover patterns and trends that track performance levels and identify trouble areas.

Business performance metric	Frequency
Pipeline by owner or owner role	Monthly
Monthly sales trends	Monthly
Activity type by assigned owner	Quarterly
Win ratio for current and previous fiscal year	Quarterly
Open leads by owner role – open not contacted	Quarterly
Deal type by owners winning – current and previous quarters	Quarterly
Deal type by owners losing – current and previous quarters	Quarterly

Successful adoption is critical to your CRM success. It gives you an overall sense of your organization's health from the top down. As you gain experience with adoption metrics, you can prioritize those areas where you need to focus, adjust, and improve. Whether you're just rolling out Salesforce CRM or have used it for a while, drive up your user adoption rates to get the most from your solution.

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10 tips for a successful training plan

Having a terrific training plan is a huge step toward getting Salesforce CRM off to a great start. After all, user adoption is the single most important ingredient in success. With more than 1.5 million users raving about Salesforce CRM, our customers confirm the importance of training when it comes to adoption. We've talked to those customers—across industries and around the world—to come up with the following 10 best practices for creating a successful training plan:

Abstract
Get an overview of the key ingredients that will make your training plan a success.

By: Erica Kuhl

1. **Set expectations** – To your users, Salesforce CRM is all new, so your first task is to give them an overview and to set expectations— what *they* can expect from the application and what *you* expect from them. If possible, involve your executive sponsor in this presentation to highlight his or her support and the importance of Salesforce CRM to your company.

2. **If it's not in Salesforce CRM, it doesn't exist** – It's a good idea to set this expectation right away— otherwise, you lose key advantages such as giving managers visibility into the pipeline and doing accurate forecasting. Have your executive sponsor deliver this training segment as well to show that you mean it.

3. **Be clear about how users are measured** – Have clear metrics to let users know how they'll be measured. For example, set target dates by which users must make changes, managers must review the funnel, and when pipeline reports will be pulled. Other metrics include how often users log on and how many objects they create. We suggest that your executive sponsor also deliver this segment.

4. **Answer "What's in it for me?"** – Don't just make demands—get people excited as well. The best way to do so is to show how Salesforce CRM will make life easier—for example, with less administrative work, easier reporting, around-the-clock access, a clear view of the sales funnel, or easy forecasting. Ask one or more respected power users to deliver this training segment.

5. **Provide hands-on training with real-life scenarios and data** – Don't make users figure out how hypothetical data applies to them. One way to get people excited is to let them see *their* data in the application, to show firsthand what Salesforce CRM can do for them. Be sure you clean your data and develop day-in-the-life scenarios your users will recognize as theirs.

6. **Reinforce your processes** – Treat Salesforce CRM as an opportunity to roll out more effective processes that make life easier for users. For example, introduce a new Opportunity process that uses the application's Lead functionality to get leads directly from the Web and into the application.

Best practice

7. **Help users learn the lingo** – Create cheat sheets with Salesforce CRM terminology, simple overviews of your processes, and step-by-step summaries of the most important processes. These job aids will serve as handy, easy-to-use references. Also consider giving users a head start by using the free online course as a training prerequisite.

8. **Offer incentives** – Motivate your users to dive right in with contests, incentives, and a little competition. For example, you could award a $500 prize to the first users to create 15 new Accounts or generate a pipeline report. Money is a great motivator for sales users, but so are prizes such as iPods or iPhones. You can also use a leader board in the application to show how individual users compare in adoption to generate some healthy competition.

9. **Get feedback** – Be sure to leave time for Q&A and ask people for their opinions. To get off to a good start, it's important to clear up any confusion and to find out what's on your users' minds. Make it a priority to try to incorporate feedback into the application—and then be sure to communicate those changes to show users that they have a say in how the application works.

10. **Provide follow-up training**. Some people think you train users once and you're done. But successful training isn't a one-shot effort. Be sure to follow up after a few weeks because by then, your users will have a new set of questions. A great way to provide follow-up training is to recruit enthusiastic users to follow up with their peers and use what they find out to create highly targeted mini-training for various user groups.

Providing great training isn't difficult, but it does require planning, effort, and an ongoing commitment. Use these tips to help you create and execute a training plan that works!

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How to develop a comprehensive training strategy

Survey after survey shows that training is one of the top things you can do to make Salesforce CRM a success. Whether your company is large or small, whether your business processes are complex or simple, training has a huge effect on user adoption and user productivity.

How should you proceed? The Best Practice document "10 tips for a successful training plan" gives a quick overview of suggestions you won't want to miss. This document provides a more comprehensive framework for all your training needs and takes you through the topics related to the following stages:

- Developing a training strategy
- Developing your curriculum
- Deploying and delivering your training

Abstract
Training is one of the most important investments you can make. Find out how to do it right.

By Andi Michaels

Training Methodology		
Training strategy	**Curriculum development**	**Deploy training**
Training lead	**Instructional designer**	**Instructors**
• Business objectives, KPIs, and WIIFM • Training approach • Curriculum design and development • Scheduling training delivery • Training evaluation and feedback • Post-deployment support structure • Adoption recommendations • Assumptions and risks	• Audience analysis • Curriculum design approach • Tracks • Deliverables • Facilitator guides • Participant guides • Quick reference cards • Presentation decks	• Train-the-trainer • Power user training • Leadership training • End-user training • Ongoing/new hire training • On-site training • Virtual training • e–learning • Brown bag sessions • Blended approaches
Training environment (sandbox vs. production, data migration and set up, integration)		
Adoption dashboards (What to measure and how to train to it?)		

Best practice

Develop a training strategy

The training strategy summarizes the overall plan. It captures business objects, documents key requirements and pain points, identifies challenges, and outlines the types of training as well as the actual training delivery schedule.

It's critical to get involved early in any Salesforce CRM project to understand the overall goals of the implementation—and to learn about your users' challenges and pain points. At this stage, designate a training lead to work with the project team. As you develop your strategy, keep the following points in mind:

- **Organizational readiness and communication planning**

  - As soon as possible, create a communication plan that specifies what information will be sent and when. At a minimum, you should tell users what changes will come, why, and when.

  - Consider the different roles and business units. Do you need specific materials and training for each audience? Also, if you're working with a global deployment, be sure to consider cultural differences.

  - Be creative in your messages: Consider using your marketing department to make it something users look forward to. Think about where users are located to determine what approach works best from a delivery perspective. Can you leverage the Internet? Can you take advantage of upcoming national sales meetings?

  - As you plan, don't forget to include "what happens after training?" Include a post-deployment support plan that identifies what users will be measured on and where they can go for help. Plan in continued support; for example, brown-bag sessions and monthly tips &tricks emails are excellent ways to keep users engaged and provide ongoing training.

- **Training environment**

  Work with the project team early to discuss what environment you can use to train your users. For example, does your organization have a sandbox environment or do you need to train in the production environment? Also consider the following issues:

  - Ask the project team what data can be made available for training. If you can't get actual data or all the data, ask to get data that's as close to "real life" as possible so you can use the most powerful and relevant examples. Try to find the "wow" factor by including key reports and dashboards that show how life will get better with Salesforce CRM.

  - Do you need to consider integration points with back-end systems, such as automatically populating account information from an SAP system? If you're using a sandbox environment, is it set up? Make the training experience as true to the user's actual work experience as possible.

- **User adoption**

  You should focus on adoption from the start. Decide early what metrics to measure; it will influence how you plan your training. Also determine early on whether users are willing to adopt and make sure you have management support to enforce use of the system, if required.

  - To track adoption, take advantage of the free [Adoption Dashboards](#) on the AppExchange to follow adoption trends and intervene if necessary. This information lets you track whether users are using the app and using it correctly—and helps you better coach users, as needed. You can tweak these dashboards to meet your specific needs.

  - Consider implementing a super-user program to provide additional support toward your adoption goals. Citrix used performance managers to help with training delivery and provide additional assistance after go-live.

Develop your curriculum

Start with an audience analysis to make sure you develop the right materials for the right users. At this stage, designate an instructional designer to develop your training materials. Then decide what your deliverables will be. And always keep in mind this burning question: "What's in it for me?" Your curriculum should answer that question.

As you develop your training materials, keep these considerations in mind:

- Make the most of existing materials. Get an inventory and make that information available to your instructional designer.

- Successful training tends to be scenario-based, rather than focusing on features and functions. Try to follow the work processes of your users to make the training relevant.

  Your materials should match the learning style of your users. The following materials are tried-and-true approaches:

  - **Facilitator guides** – Include detailed instructor notes on what to emphasize, details of timing, and so on. Be sure to map these guides to your participant guides.

  - **Participant guides** – Provide end-to-end, detailed training documentation. Interactive, hands-on exercises are a great way to provide realistic training.

  - **Quick reference cards** – Give users something to use when they're on the job. Use the cards during training for reference and consider publishing them online later.

  - **Slide shows** – Use such presentations to give your users the big picture. And remember: Keep it simple!

Deploy and deliver your training

As you get ready to start training, consider what type of training you need, how many users must be trained for each role, and how many days until the application is ready to go-live. Based on this information, decide how many instructors you need. Be sure your instructors have training experience. Ideally, they should also have experience in the user role they'll be teaching.

Depending on your user roles, consider any combination of the following types of training:

- **Prerequisite training** – Create awareness and excitement with simple 5–10-minute "teaser" recordings that explain what's coming, project goals, and of course, "What's in it for me?" Consider using an inspirational video clip of a popular executive, or someone else people admire, to discuss how Salesforce CRM will make life better.

- **Train-the-trainer** – If you have internal trainers and need to train many users, this is an effective approach in which you train those trainers to deliver the materials you developed.

- **Leadership training** – Regardless of the size of your company and your management team, adoption is always higher when management promotes Salesforce CRM by showing they have the necessary knowledge to hold their teams accountable.

- **End-user training** – Hands-on training is perfect for making training personal, relevant, and interactive. The ideal classroom size is 1 instructor to 15–20 participants. If it's not possible to present "live," interactive, on-site training, use virtual training and turn over the mouse to give participants hands-on experience with a demo scenario that gets them involved and active.

- **Brown-bag sessions** – Use these formal or informal sessions to keep the conversation going. You can answer questions, follow up on training topics, discuss new features, or whatever makes sense for your business and your users.

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9 steps to effective change management

Your users have lots of ideas and requests for functionality. And salesforce.com releases new features three times a year (see "6 steps to making the most of each release"). Because you can't do everything at once, how can you make sure you focus on those product enhancements that most effectively drive user adoption and have the biggest impact on your organization—and your users' day-to-day jobs?

Here are 9 steps toward a successful change management and product release strategy:

1. Get a strategy
2. Collect input
3. Get a sponsor
4. Define scope and impact
5. Prioritize
6. Configure and test
7. Communicate and train users
8. Deploy
9. Follow up

Abstract

By continually enhancing your application, you'll improve adoption, broaden usage, and improve your user's overall experience.

To make sure you're making those changes that will have the biggest impact on your business, you need a product release strategy that will "bubble up" those enhancements that will keep your application—and your users— performing at their peak.
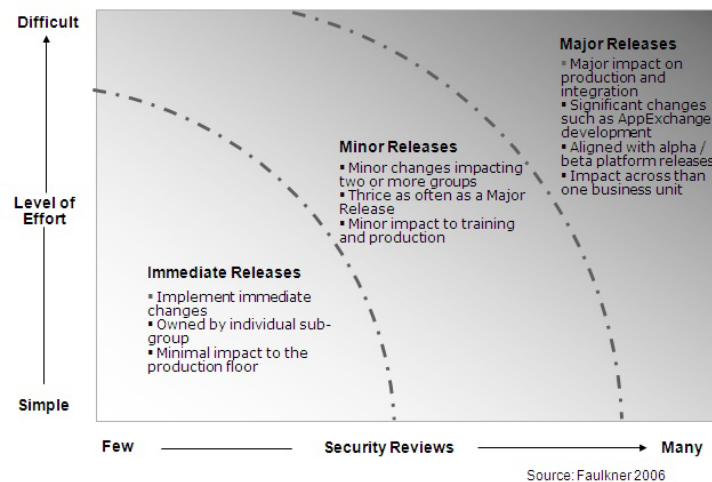
By Sharon Bartol

Step 1: Get a strategy

A core tenet for initial releases is "keep it simple." You can always add features and process improvements after the application is live. And let's be honest—not every request should be incorporated into your deployment. The scope and level of effort may be too great, the request may not align with your business goals, or the change may have a negative impact on some users.

To determine which user requests—and/or seasonal release features—you'll implement, you need a strategy. Part of that strategy is to identify which changes can be made quickly and easily, and which need to be reviewed and approved by your change management group. Below is an example of a release management strategy that categorizes changes into three types of releases, depending on whether they can be made quickly or should be scheduled for future releases. In most cases, features from the seasonal releases are quick to implement and could be released immediately.

Difficult

Major Releases
• Major impact on production and integration
• Significant changes such as AppExchange development
• Aligned with alpha / beta platform releases
• Impact across than one business unit

Minor Releases
• Minor changes impacting two or more groups
• Thrice as often as a Major Release
• Minor impact to training and production

Level of Effort

Immediate Releases
• Implement immediate changes
• Owned by individual sub-group
• Minimal impact to the production floor

Simple

Few ——————— **Security Reviews** ——————→ Many

Source: Faulkner 2006

Step 2: Collect input

There are lots of ways to get feedback from your user community—the important thing is that you **do it!** Here are some features of Salesforce CRM that will help:

▪ Use the ideas functionality of Salesforce CRM to create a two-way communication channel between your change management group and your user community. Users love it—they can always see the latest status of their ideas; for example, Under Consideration, Approved, or Rejected.

▪ Use the case object to capture internal enhancement requests. You can collect all the information you need to evaluate the request. Then use the built-in report and dashboard functionality to monitor the number, type, and frequency of specific requests.

Step 3: Get a sponsor

Having an engaged executive sponsor is key to an effective change management process. The sponsor will help guide the change management group by defining the process and establishing strategic objectives. The sponsor should also contribute to the communication plan and help define the message to your users to drive adoption.

Step 4: Define scope and impact

Once you have a list of enhancement ideas, determine the level of effort, scope, and impact of each idea. For global or cross-functional deployments, it's critical to align processes between functional areas. These processes should be reviewed by the change management group to avoid negatively affecting other functional areas.

This step also provides an excellent opportunity to engage with your users. It's a good idea to scope out the proposed features with a specific use case in mind and to shadow your users' day-to-day routines to predict the effects of any changes.

Step 5: Prioritize

Incorporating every enhancement request and idea is just not feasible. That's why defining the overall impact is important in helping the change management group and sponsor decide which enhancements to implement, which to target for a later date, and which to reject. To make those decisions, consider using the voting capabilities of salesforce.com's ideas functionality to give users a voice in this process.

Step 6: Configure and test

Depending on your Salesforce edition, you'll have access to one or more sandbox environments with a copy of your production data. You can use the sandbox to configure and test any enhancements and changes before deploying them to your production environment. This step is critical to a smooth and surprise-free deployment.

Step 7: Communicate and train users

Don't derail your new release by not having a communication or training plan. Set employee expectations about the upcoming changes, such as when they'll happen and how users will be trained. And be sure to answer the question, "What's in it for me?"

- Take advantage of your sandbox environment to provide a real-life training environment for your users. Depending on the complexity of your release, you have several training options, including online training from salesforce.com and the release notes. For complex implementations, consider hands-on classroom training. For very simple implementations, an email notification or FAQ document may be enough. Check out all the training options available through salesforce.com.

Step 8: Deploy

Once your new release is configured and tested and your users are trained, it's time to push your new release to your production environment.

- Use the Eclipse IDE to manage configuration changes.

- Use a browser and Eclipse Cloud Deploy to manage Force.com code (Apex), schema, Force.com pages (Visualforce), and other changes between your sandbox and production environments.

If you're not sure which option is right for you, check with a technical resource at salesforce.com.

Step 9: Follow up

Finally, measure the success of your new release and identify areas you can enhance in the future. After you deploy, reconnect with your power users or survey a broader base of your user community to start the cycle again. This approach helps to keep your releases fresh and timely—you'll always deliver those features that will make the biggest difference to your user community.

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5 simple steps to reports and dashboards

Reports and dashboards show how you performed in the past and what's happening at the moment—they're key to driving success and adoption for any CRM project. The information provided by reports and dashboards is especially important in today's environment, where it's critical to be proactive, rather than reactive, in your approach. You want to be able to spot trends and act on them immediately.

For example, a sales organization wants to know which deals were lost, which competitors are gaining ground, and whether the average time to close is increasing or decreasing. For a customer service organization, it's important to track the average days or time to close and satisfaction. And marketing organizations want to track campaign effectiveness and ROI.

Abstract
To track and improve business performance, you need reports that show trends as well as real-time dashboards for up-to-the minute information about your business. Salesforce CRM makes it easy to create both.

By Leahanne Merritt

To make the most of Salesforce CRM's reporting capabilities, it's important to plan carefully and then follow these 5 proven steps to making reports and dashboards part of *your* business process:

1. Know what keeps your executives up at night
2. Capture the right data
3. Build your reports
4. Build your dashboards
5. Use data to change behavior and drive results

Step #1: Know what keeps your executives up at night

Finding answers to critical business questions and making good decisions is vital to executives—and to their companies' success and competitive position:

- **Ask questions and start at the top** – When designing reports and dashboards, first define what your executives—your CEO; the VPs of Sales, Marketing, Support; and your channels—need to know to run their business. What are their key metrics? What behaviors do they want to encourage?

- **Align metrics with your company vision** – Take your business objectives, determine the metrics that measure those objectives, and map those metrics to the capabilities of Salesforce CRM. For example, if forecasting and tracking large deals are important to the VP of Sales, make sure you understand the key data points that give insight into those tasks and the best frequency for reporting that data. Or if your VP of Marketing needs to track response rates, sales, trials, meetings, or campaign awareness, you need to capture that data at the campaign, campaign member, lead, and opportunity level to return meaningful metrics.

Tip: Salespeople thrive on competition. If you make it possible to track their progress in relation to their peers, your overall adoption rates will go up.

Step #2: Capture the right data

Your reports and dashboards are only as good as the data behind them—planning is the key to capturing and displaying the correct metrics. Identify your sources early. Consider working backwards: plan your reports first and then configure the application by adding custom fields, formulas, and so on.

If your marketing team wants to see campaign effectiveness over time, for example, you'd want to track which campaigns lead to leads, opportunities, and closed/won deals. Every week, you could use snapshot reports on *lead status by campaign* and *opportunity status by campaign* to show how many leads and opportunities were received and converted from each campaign.

- **Manage what you measure** – Pick a limited number of key performance indicators (KPIs) or metrics. A third-party survey of the number of metrics used by CEOs showed that 52 percent use 5–10 metrics to manage their entire business.

- **Limit the number of reports/dashboards** – Focus on those tied to specific business objectives.

- **Develop a clear, concise naming strategy** – That approach will make report and dashboard folders easy to find. Use labels that are meaningful to your users; for example "MW Sales Team," "Premier/Gold Support Analysts," or "Converted Leads for Verticals Team." For dashboard folders, start with the word "Dashboard" (Dashboard – MW Sales Team," "Dashboard – Premier/Gold Support Analysts").

- **Determine security and access** for the report and dashboard folders and give users access based on their job functions or roles.

Step #3: Build your reports

Most customers start with a current report tracked in Excel or Access and use it as a baseline. As you begin to build reports in Salesforce CRM, there are several resources to help you get started.

- **Start with out-of the-box reports**. Salesforce.com offers standard reports across all standard objects. You can use these reports as the basis for your custom reports.

- Understand the three different report types and how they're used:

  - **Tabular reports** are the simplest and fastest way to return your data in a simple list view format. Keep in mind that tabular reports can't be used to create dashboard components.

  - **Summary reports** return your data with subtotals and other summary-level information. Summary reports are great for showing average dollar values for *closed won opportunities by salesperson* or *number of cases by status by support representative*.

  - **Matrix reports** show data summaries against both horizontal and vertical criteria; for example, *total sales per sales rep per year by quarter*.

- Bookmark the [Analytics blog](#) on the Salesforce.com Community Web site. Check back on a regular basis (especially prior to each release) for tips, tricks, and use cases for new analytics features and product enhancements.

Step #4: Build your dashboards

When you finish planning after asking all the right questions and building your reports, you're ready to build your dashboards. The key to building dashboards your VPs, managers, and users can't live without is to match the dashboard metrics to a compelling business metric.

- Understand the different dashboard formats and what type of data is best displayed in each format:

  - **Horizontal bar/vertical column charts** are great for showing geographical data, stage or status information, or any data that's part of a single grouping.

- **Pie and donut charts** are useful for displaying data that shows proportions of a total, such as the number of leads by lead source.

- One of the newest chart types, **the funnel**, is best used for showing ordered picklists such as *opportunity stage*, *case status*, or *lead stage*.

  For more information, go to Help & Training and search on chart types.

- Don't reinvent the wheel! Go to the AppExchange, download the free, pre-built dashboards—such as the Lead and Opportunity Management dashboard—created by [Force.com Labs](#), and customize them to meet your business needs. Use these dashboards to track and measure adoption, sales productivity, campaigns, lead generation, and service and support.

Step #5: Use data to drive behavior and produce results

Reports and dashboards are designed to be iterative—it's important to keep them current and relevant. To successfully roll out business metrics, good communication is key. Make it easy for your users to find, view, and access the dashboards relevant to them. Use the schedule refresh feature to ensure your users see the most recent data. And use schedule and email reports and dashboards to remind your users that their business-critical metrics are in Salesforce CRM.

- **Manage from the top down** – Encourage managers to run forecast calls directly from their dashboards. Many customers also have the following mandate for sales: "If it's not in Salesforce, it doesn't exist." This directive proves to be extremely motivating for salespeople.

- **Include adoption and data quality metrics** – Include a dashboard component that tracks faulty data, such as all accounts without an industry, contacts without valid email addresses, or leads with a status of "qualified" that haven't been converted. Again, publishing such metrics can be extremely motivating.

- **Engage your user community** – Don't make the mistake of tracking such metrics only at the executive level—make sure your users see the same metrics on their personal dashboards. What do your users want to see? What will help them do their jobs faster and smarter? Those are the metrics that matter. For example, you could create reports and dashboards that rank salespeople by top deal or top salespeople per quarter.

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