Salesforce CRM
Getting Started Guide
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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.
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):

- Build your team
- Define and prioritize your goals
- Define your process
- Map your process to Salesforce CRM functionality
- Define the fields you need
- Define the reports you need
- Train your administrator
- 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:

![Diagram of a Sales process]

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
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:**

![Role Hierarchy Diagram]

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](#)
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
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.
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- 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!
Getting Started Guide

- “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
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](http://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 sync 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](http://www.force.com/microsoftoutlook).


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](http://www.salesforce.com/us/developer/docs/prod_dev_tech_docs.html) and [Tips for Using HTML Email Templates](http://www.salesforce.com/us/developer/docs/prod_dev_tech_docs.html).

For additional tips on how to increase adoption and ensure success, see “[A CRM Champion’s Guide to Adoption](http://www.salesforce.com/us/developer/docs/prod_dev_tech_docs.html).”
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 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:
1. The Release Preview for an overview of new features
   b. Release Notes for details, including installation instructions
   c. A Webinar in which you’ll hear from the product team from each area

2. **Identify** the three most promising features:
   a. Use the vision and goals you defined earlier to select the features you want to activate
   b. Get input from your users to narrow your short list
   c. Sign up for the pre-release program to get your own test environment to try them out

3. **Communicate** about any changes:
   a. Send an email and talk to your users
   b. Consider mini training sessions to get everyone up to speed
   c. 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
- 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