Salesforce Implementation Checklist

Manufacturing, Automotive, and Energy Companies

rSTAR TECHNOLOGIES

Introduction

Salesforce is the world's leading CRM platform and a powerful customer relationship management system used in many industries. Manufacturing, automotive, and energy companies (MAE) have found it to be especially helpful to reach their CX, sales, and service goals as part of their digital transformation.

For manufacturers, it offers a frictionless customer journey and the opportunity to automate many customer touchpoints for competitive advantage. Automotive companies can use Salesforce alone or integrated with their ERP systems to manage inventory, personalize the customer experience, and more. Energy companies benefit from personalized customer experiences and improved service.

As a SaaS platform, Salesforce offers a ready-made framework from which you can immediately launch a successful CRM program. But it can also be customized, either through individual project-based work or by adding apps from the official Salesforce AppExchange.

To effectively launch a Salesforce-based CRM initiative in your company will take time and effort. If you are not familiar with the platform or lack certified Salesforce developers, working with an implementation partner is a critical step to ensure you receive the optimal benefit from your Salesforce investment.

The Salesforce Ecosystem

There are numerous Salesforce platforms, each with a different focus to ensure maximum impact for its target industry.

The major platforms are Manufacturing Cloud, Service Cloud, and Sales Cloud. Additional stand-alone products can be added to solve other needs, such as Pardot for email communications, etc.

rSTAR's expert Salesforce consultants can develop a roadmap to show you exactly what's needed and why, and connect the dots among your tech tools to ensure they solve critical business needs.

Begin

1. Identify your executive sponsor. The executive sponsor is someone from the executive team who shares your vision for digital transformation through Salesforce.

2. Gather the internal team who will guide the project. The internal team should include representatives from all major departments, including IT, who will be project stakeholders. Don't forget to include representatives from the back office: accounting, finance, operations, order fulfillment, and more. All are vital to the project's success.

3. Allow the team members time to work on the project. Examine their workload and ensure they have enough time to collaborate on project goals, timelines, etc. and attend project meetings.

Define the Vision

4. Identify business-critical goals for 1 year, 5 years, and 10 years. Working with representatives from key company areas such as sales, marketing, operations, finance, and other departments, identify the KPIs that must be met. Also identify pain points and align those to critical objectives.

5. Prioritize KPIs and align them with business outcomes. Select the five "mission critical" objectives to achieve for each timeline: 1, 5, and 10 years. These will be the driving force behind the Salesforce implementation and setup phase, and will help guide the implementation team to achieve your goals.

Outline the Basics

6. Outline key project deliverables and a rough timeline (you'll finalize the timeline with your Salesforce implementation partner).

7. Set a budget range for the project. Since it may be impossible to accurately set a budget before speaking with potential partners, develop budget ranges based on a crawl, walk, and run approach. It may be easier to launch the project with a smaller budget, achieve project milestones successfully, then add onto the project to walk and run later.

8. Ensure your executive sponsor shares the plan with the executive team and secures the necessary budget and internal requirements to proceed.

Choose a Partner

9 Find potential Salesforce implementation partners on the AppExchange or through reviews. Ask your Salesforce AE for recommendations.

10 Read customer comments and reviews.

11 Check their Certifications and Accreditations; Accreditations ensure a better potential fit for your industry as they are proof of industry specialization, while Certifications demonstrate individual knowledge and skills of specific Salesforce applications.

12 Schedule a roadmap or introductory consultation call with potential partners. Ensure any necessary paperwork, such as NDAs, are on file before sharing project plans with them.

13 Share milestones, goals, KPIs, and budget with the potential partners. Consider developing a written request for proposal (RFP) and sharing it with partners you are interviewing to ensure consistent information is presented to every partner you interview.

Review Proposals

14 Review implementation partner proposals and compare the proposal against the framework developed by the internal team. Collaborate on any outstanding questions.

15 Check references and meet again with the partner to firm up the approach and scope of work (SOW).

Implement the Project

16 Review data in your current system and if necessary clean existing data. Clean data going into the new CRM is essential for data validity and integrity.

17 Understand your partner's quality assurance, testing, and checkpoints, and work with them to ensure the project is on schedule. Review the work at the end of each sprint.

18 Test work in a sandbox environment. Provide timely feedback to partners when it is requested. Share concerns or issues with partners.

19 Schedule training sessions for users. Select one super user from each department; this person receives additional training and serves as an on-location peer trainer, if needed. Begin training key stakeholders and groups on using the new system. Note that system administrators should be part of the project team so they see what is being configured and built. Involving them throughout the process ensures they have complete knowledge of the systems and its capabilities.

Follow Up

20 List any additional work required such as customization, bug fixing, troubleshooting, and report creation.

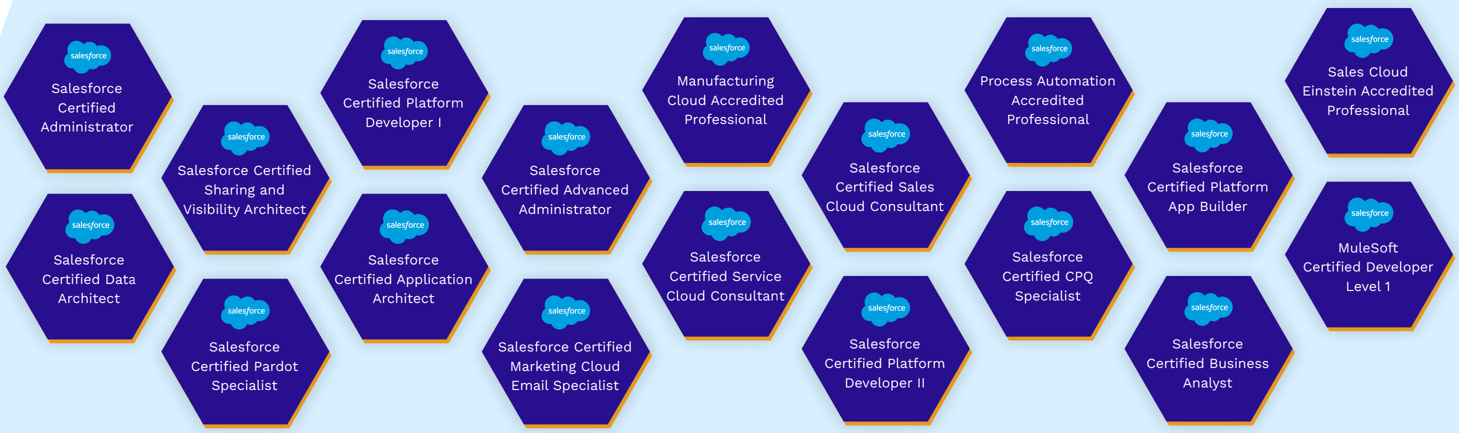
21 Work with your implementation partner on completing such work if it is within the scope of the SOW.

22 Continue to identify areas of improvement. Salesforce implementation isn't "one and done" - it requires maintenance and upkeep. As your company grows and its needs evolve, you may also want to add additional Salesforce features, apps, and perhaps, customer projects, too.

23 Provide honest feedback to your implementation partner and leave a review for them on the Salesforce AppExchange.

Ready to Begin Your Salesforce Project?

rSTAR Technologies is a trusted Salesforce Partner with over 20 years of experience working with manufacturing, automotive, construction, and energy and utility companies. With several manufacturing Accreditations and over 30 Certifications, our team understands both the nuance of Salesforce and the unique challenges your industry faces. Read our reviews on the AppExchange, find testimonials and case studies on our website, and schedule your complimentary Salesforce roadmap call today.



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