

depends on careful planning. Our Sales Cloud implementation checklist covers all the essential steps—from preparation

Implementing Salesforce Sales Cloud can transform your sales operations, but success

to user training—ensuring a smooth rollout. Whether you're starting fresh or optimizing your setup, this checklist will help you unlock the full potential of Sales Cloud. Download the infographic now to streamline your implementation and drive better

results with Sales Cloud.

#### The first step involves picking the most feasible salesforce editions offered based on your

**Make Your Pick** 

organization's demands and processes to match the platform licensing and pricing needs.





## SFDC System? In order to improve data security and refine the organizational structure, set up role hierarchies and

Who Has Access To The

user profiles for relevant access and permissions.

### Maintain data integrity and hygiene by aligning existing data with long-term goals, assessing existing

**Data Reliability Check** 

data quality, addressing errors promptly, and considering supplemental data for better insights before exporting data from your legacy systems.





#### Price Books, Quotes, and Orders) is crucial to align Salesforce with your business's unique requirements.

Schema Alignment

Implement schema for these objects to ensure your Salesforce system fits your sales processes

Customizing standard Salesforce objects (Leads, Accounts, Contacts, Opportunities, Products,

- Effective lead capture Streamlined account & contact management Better visibility into sales stages
  - Accurate quoting

### Create custom fields, tailor page layouts, and set up conversion and lead assignment rules for improved

Lead Management

lead and case routing. **Account & Contact** 

Configure and optimize the standard Lead objects in Salesforce to customize lead-related processes.





## interactions. This step is pivotal for capturing specific customer

Management

information, tailoring Salesforce to your organization's unique needs, and boosting customer relationship management.

Customize Salesforce's Account and Contact objects with custom fields to store vital business data. Simultaneously, optimize page layouts and record

## strive for a balance between reflecting your sales process and avoiding complexity.

Create Activity, Events, and Task records to capture logs of individual Opportunity interactions, meetings, and follow-ups.

With 9 customizable opportunity stages,

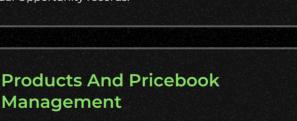
Opportunity Stages Set Up

 Configure and set up the Opportunity path and enable users to track the opportunity status conveniently for a streamlined sales pipeline and improved forecasting.

- Implement a system for uploading, referencing, and sharing documents/notes related to individual Opportunity records.
- Salesforce system include all the essential details and product families while maintaining a comprehensive product catalog covering all service/product offerings.

Management

market segments.





# different products and services, effectively organizing your pricing structur

Ensure the created Products in the new

Develop unique price guides for various

Create pricebooks to manage pricing for

Seamlessly manage quotes by automating their creation when specific products are selected on Set up professional templates. Generate PDF quotes & ensure synchronization

- efficient quote management process.
  - **Automation**

for targeted messaging.

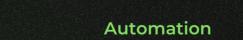
To streamline your processes with automation:

Configure automated email-sending processes

Develop automation rules to update fields based on the specific chosen criteria, reducing manual

- Additionally, create automation processes for checklists at each workflow stage. As a best practice, collaborate with respective
- Visualization and Dashboards

teams to identify automation needs and regularly refine rules to adapt to changing requirements.



Automatically attach quotes to files and attachments when sent to customers. Collaborate with sales and customer

service teams to define and refine template requirements, maintaining a consistent and

with Opportunity products.

task generation, ensuring users have task

appropriately to provide a proper analytical view of the data within the organization:

To ensure all the data captured is presented

Create a standard set of reports, dashboards, and Consequently, set up the dashboard on the home

screen of your Salesforce system giving access to relevant users. Data accuracy and data cleansing are prerequisites essential to maintain transparency.





charts.

