CRM ROLLOUT GUIDE CHECKLIST

Section 1: Preparation
- Identify "Go-Live" Date
- Identify Project Manager, Administrator, and Other Key Team Members
- Add Licenses
- Send Introductory Email
- Attend Training
- Review Technical Requirements
- Business Process Review
- Notify Billing Contact at Your Company

Section 2: System Configuration
- Verify Your Company Information
- Define the Role Hierarchy
- Add Users
- Define the Sharing Model and Access Rules
- Set Password Policies
- Set Company Messages and Useful Links
- Customize Standard Picklists and Create Custom Fields
- Set Field-Level Security
- Customize Page Layouts
- Set Up Email Templates
- Set Up Mail Merge Templates
- Customize Lead Settings
- Set Up Lead Queues
- Set Up Lead Assignment Rules
- Set Up Web-to-Lead
- Review the Automated Support Features
- Set Up Case Queues
- Customize Support Settings
- Set Up Case Assignment Rules
- Set Up Case Escalation Rules
- Set Up Web-to-Case
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This guide contains examples and instructions to help your organization have a successful rollout of salesforce.com. It is divided into simple steps to walk you through the entire process. Some steps will take just a few minutes; others require input from multiple team members. Depending on which salesforce.com features you'll be using, you can decide which steps are required or optional for your rollout.

Rollout Steps:
1. Preparation
2. System Configuration
3. Data Management/Migration
4. Rollout
5. Follow-Up

Section 1: Preparation

Preparation involves all of the planning you need to do before you can begin using salesforce.com.

Preparation Steps:
1. Identify "Go-Live" Date
2. Identify Project Manager, Administrator, and Other Key Team Members
3. Add Licenses
4. Send Introductory Email
5. Attend Training
6. Review Technical Requirements
7. Business Process Review
8. Notify Billing Contact at Your Company

Identify "Go-Live" Date

The "Go-Live" date is when you want your users up and running on salesforce.com. This date drives all of the rollout activities, and you can work backwards from this date for planning purposes.

Identify Project Manager, Administrator, and Other Key Team Members

Identify the Project Manager ("Champion").
The Project Manager leads the entire rollout process. The Project Manager should be someone who can gather information about your business processes, identify users and their roles, and oversee the rollout of your CRM service.

Identify the Administrators.
This should be the Project Manager, as well as anyone else that will be administering the service (adding users, resetting passwords, managing the service, etc.). We recommend two Administrators at a minimum, and several more for larger organizations.

Identify the Data Migration Specialist.
This is the person responsible for managing the export and import of data from your old system to salesforce.com.

Identify the Solution Managers.
This will be one or more users to manage the knowledge base. These users are product experts from your Support team with excellent written communication skills.

Identify the Marketing Users.
Only designated Marketing Users can create and manage campaigns. To designate someone as a Marketing User, you must first obtain Marketing User Licenses for salesforce.com.
Identify the Offline Edition Users.

Identify the Wireless Edition Users.

Add Licenses

Identify all of the users who will be using the salesforce.com service and make sure you have the appropriate number of licenses. These users will be anyone who needs to access customer information.

Action:
Click Setup at the top of any salesforce.com page and choose Subscription Summary. To purchase Marketing User Licenses, Offline User Licenses, or Wireless User Licenses, contact your salesforce.com Account Executive.

Send Introductory Email

It's important to notify your users prior to the "Go-Live" date to introduce them to salesforce.com and prepare them for the rollout process. Email the users with an introductory message (see sample email below) and let them know about some of the ways to become familiar with salesforce.com, such as visiting www.salesforce.com and taking the Introductory Tutorial.

Action:
Copy the sample email below, modify it if necessary, and email it to everyone in your team who will be using salesforce.com.

Sample Introductory Email:
From: Your Company's Project Manager
To: Your Team Members
Subject: Introducing salesforce.com

Dear Team,

As part of our company-wide plan to move into the 21st century and become the market leader, we will soon be rolling out a great tool that will help us accomplish our goal. The tool is salesforce.com, which gives us all the benefits of Customer Relationship Management (CRM) immediately, affordably, and reliably. By boosting individual productivity and enhancing collaboration among the team, salesforce.com will help us operate at our maximum potential. Salesforce.com will help you:

- Be more informed about your customers
- Close more sales
- Respond quickly to customer requests
• Manage marketing programs and measure marketing ROI

Over the next few weeks, you’ll be participating in our rollout of salesforce.com, which will involve meetings, training, and the kickoff, planned for (enter kickoff date). We will let you know well in advance of these activities, so you can plan for them and be an active participant.

You will soon be receiving an email with your username and password for salesforce.com. Once you are logged in, as your first step towards learning how to use the service, please take the Introductory Tutorial which will help you get familiar with salesforce.com.

The Management Team is very excited to be able to provide the first online Customer Relationship Management service for you to help you be the best in our industry.

Regards,

Project Manager for salesforce.com Rollout

Attend Training

Salesforce.com offers a series of free, live, online training classes, for each user type including standard users, administrators, and managers. Before you schedule any meetings or begin setup, the Project Manager and Administrators should attend the Administrator Fundamentals classes. In addition, Marketing users and administrators should attend the Campaigns Training. It is also a good idea for administrators to attend the Leads Administrator Training. Solution managers and administrators should attend the Support Administrator Training as well. This will ensure you have a good understanding of how to set up salesforce.com and how to complete a thorough business process review, which you will become familiar with shortly.

It is also a good idea to attend the other trainings to be as familiar with salesforce.com as possible.

Action:
Click the Training link at the top of any salesforce.com page to view the training schedule and sign up for a class.

Review Technical Requirements

<table>
<thead>
<tr>
<th>Requirements to use salesforce.com</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating System</td>
</tr>
<tr>
<td>Browser</td>
</tr>
<tr>
<td>Internet Connection</td>
</tr>
</tbody>
</table>
Business Process Review

The Business Process Review (BPR) is a series of questions that you will answer regarding how salesforce.com will work in your organization. At the end of the process, you will have gathered the information necessary to set up and roll out the service successfully. We recommend all organizations that will be customizing salesforce.com to review the BPR at a minimum. Larger organizations with more complex business processes will want to follow the formal BPR process which includes a meeting with individuals who have a say in your business processes.

Action:
Click Setup at the top of any salesforce.com page, click Administration Setup, and choose the CRM Rollout Guide link at the top of the page. Click the Preparation link from the opening page, and then click the Business Process Review step. Then Download the "Business Process Review" document to guide you through the process.

Notify Billing Contact at Your Company

To ensure that the billing process for your salesforce.com service is set up correctly, you should notify your Accounts Payable department about salesforce.com and how you have chosen to be billed.

Action:
Copy the sample email below, modify it if necessary, and send it to the billing contact at your company to let them know how the billing for salesforce.com is handled.

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### Requirements to synchronize salesforce.com with Outlook or any Palm device

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intellisync software</td>
<td>You can download the latest version of Intellisync for salesforce.com from salesforce.com. Click Setup at the top of any salesforce.com page, choose Mobile Users, and click Sync to Outlook/Palm.</td>
</tr>
<tr>
<td>Outlook</td>
<td>You can synchronize your salesforce.com data with Outlook versions 97, 98, 2000, or 2002. Additionally, if you are later syncing Outlook with your Palm, you must have PocketMirror version 2.0.1 or higher (PocketMirror is included with all Palm purchases, except Palm IIIe).</td>
</tr>
<tr>
<td>Palm handheld</td>
<td>To synchronize your salesforce.com data with your PDA, you must have Palm Pilot version III, V, or VII, or any device running the Palm OS. You also need Hotsync version 3.0 or higher.</td>
</tr>
<tr>
<td>Operating system</td>
<td>Windows 95, 98, 2000, XP, or NT 4.0, including all Service Packs; 8MB free disk space; 16MB memory (RAM)</td>
</tr>
</tbody>
</table>

See the Salesforce.com System Requirements document for more information. The document is available from the Tips section of the online help.
Sample Billing Email:
From: Your Company's Project Manager
To: Billing Contact
Subject: Salesforce.com Billing Procedures

Dear Billing Contact:

This email is to notify you that our company has signed up with salesforce.com, an online customer relationship management service (CRM) that aids our team in better communicating with our prospects and customers.

We have signed up for a (Add your term of service, e.g., quarterly) payment term for (add the number of users for which you signed up) users. We've also added (add the number of Marketing User licenses) user licenses for our Marketing team. Our payment method is by (enter your payment method, e.g., credit card).

This information may change, as we add more users or change our payment method.

Since you have been identified as the primary billing contact, please log into www.salesforce.com, using this username and password:

Username____________
Password____________

and make any necessary changes to this information.

If you have any further questions about salesforce.com billing, please see their Billing FAQ on the salesforce.com web site - www.salesforce.com.

Thank you for your assistance regarding our salesforce.com account!
Section 2: System Configuration

By now, you have taken the Administrator training classes and completed your Business Process Review, and you're ready to configure salesforce.com. System Configuration involves all of the setup and customization you need to do before you can begin using salesforce.com.

System Configuration Steps:
1. Verify Your Company Information
2. Define the Role Hierarchy
3. Add Users
4. Define the Sharing Model and Access Rules
5. Set Password Policies
6. Set Company Messages and Useful Links
7. Customize Standard Picklists and Create Custom Fields
8. Set Field-Level Security
9. Customize Page Layouts
10. Set Up Email Templates
11. Set Up Mail Merge Templates
12. Customize Lead Settings
13. Set Up Lead Queues
14. Set Up Lead Assignment Rules
15. Set Up Web-to-Lead
16. Review the Automated Support Features
17. Set Up Case Queues
18. Customize Support Settings
19. Set Up Case Assignment Rules
20. Set Up Case Escalation Rules
21. Set Up Web-to-Case
22. Set Up Solutions
23. Set Up Custom Reports
24. Set Up Web Integration Links
25. Agreement on System Setup

Verify Your Company Information

The Company Information contains the company contact information provided during signup. It also specifies the Default Locale (for number and date formatting), Default Language, Default Time Zone, and Currency Locale (for currency formatting) for your organization.

Action:
Click Setup at the top of any salesforce.com page, click Company Profile, and choose Company Information to verify your organization information.

Define the Role Hierarchy

Define your organization’s role hierarchy to control the level of visibility that users have to your organization’s data. Users at any given role level are able to view, edit, and report on all data owned by or shared with roles directly beneath them in the hierarchy.

Your organization’s role hierarchy controls:
- How sales opportunities roll up in forecasts and opportunity pipeline reports
- Who can view, edit, and report on information owned by other users

It is not necessary to create individual roles for each user, rather you want to focus on creating a hierarchy of roles to control access to data.
Action: Click Setup at the top of any salesforce.com page, choose Manage Users, and then click Roles.

Add Users

Create salesforce.com usernames for everyone who will be using the service. Fill in all required information, assign each user to a role in your hierarchy, and specify a profile for each user to determine their user privileges. Check the "Marketing User" box for users who will be managing campaigns. Check the "Offline User" box for users who will be using Offline Edition. Check the "Wireless User" box for users who will be using Wireless Edition. Check the "Generate passwords and notify user via email" box to automatically email each new user with their username and password. You can also choose to send the usernames and passwords later via the User list page (accessible via Setup | Manage Users | Users).

Action: Click Setup at the top of any salesforce.com page, click Manage Users, and click the Users link. Then choose the Add Multiple Users button. Alternatively, to add users one-by-one, you can click the New User button.

Define the Sharing Model and Access Rules

The Sharing Model specifies how your organization's users share access to certain types of records such as accounts or opportunities. The Sharing Model consists of different components:

- **Organization-Wide Defaults** - You set separate access levels for accounts (including contacts and contracts), cases, leads, and opportunities. These settings apply to your entire organization.
- **Public Groups** - Public groups are used in sharing rules to specify which users can view the data owned by members of a specific role or group.
- **Sharing Rules** - If you have set organization-wide defaults of Public Read Only or Private, you can create sharing rules to grant wider access to data owned by users in specific roles or groups.

**NOTE**
Regardless of your Sharing Model settings, users can always view, edit, and report on information owned by or shared with users directly below them in the role hierarchy. However, private opportunities can be accessed only by their owners, users above the owners in the role hierarchy, and administrators. Private contacts can be accessed only by their owners and administrators.

Action: Click Setup at the top of any salesforce.com page, click Security Controls, and click the Sharing Rules link.

Set Password Policies

You can set various password and login settings to increase the security of your organization's data within salesforce.com. The settings include the ability to specify the number of invalid login attempts allowed by a single user before his or her account becomes locked out and the period of time before a user's password expires.

Action: Click Setup at the top of any salesforce.com page, click Security Controls, and click the Password Policies link.
Set Company Messages and Useful Links

As an administrator, you can enter announcements and useful web links for everyone in your organization to see. The announcements display in the "Messages and Alerts" section on the home page, and the web bookmark links display in the "Useful Links" section.

Action:
Click Setup at the top of any salesforce.com page. Then click Customize | Home | Company Message.

Customize Standard Picklists and Create Custom Fields

- **Picklists** - A picklist is a customized selection list that lets users pick values from a predefined list of entries. You can change the values in any of the standard picklists to the terminology your team uses. Additionally, Enterprise Edition organizations can manage multiple business processes by including a subset of picklist values in a record type and making record types available to users based on profile.

- **Custom Fields** - You can add fields to your organization's records. These are called "custom fields," and they allow you to personalize salesforce.com for your organization.

You can create the following types of custom fields:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checkbox</td>
<td>Allows users to check a box, indicating a true or false attribute of a record. When using a checkbox field for report or list view filters, use 1 for checked values and 0 for unchecked values.</td>
</tr>
<tr>
<td>Currency</td>
<td>Allows users to enter a dollar or other currency amount. Salesforce.com automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.</td>
</tr>
<tr>
<td>Date</td>
<td>Allows users to enter a date or pick a date from a pop-up calendar.</td>
</tr>
<tr>
<td>Date/Time</td>
<td>Allows users to enter a date and time or pick a date from a pop-up calendar.</td>
</tr>
<tr>
<td>Email</td>
<td>Allows users to enter an email address. Salesforce.com validates the entered address to ensure that it is in the proper format. Users can then click on the field to automatically launch their email program and send an email to that address.</td>
</tr>
<tr>
<td>Number</td>
<td>Allows users to enter any number. Note that salesforce.com treats this as a real number and removes any leading zeros from the number.</td>
</tr>
<tr>
<td>Percent</td>
<td>Allows users to enter a percentage number, e.g., '10'. Salesforce.com automatically adds the percent sign to the number.</td>
</tr>
<tr>
<td>Phone</td>
<td>Allows users to enter any phone number. Salesforce.com automatically formats it as a phone number.</td>
</tr>
<tr>
<td>Picklist</td>
<td>Allows users to select a value from a list you define.</td>
</tr>
<tr>
<td>Text</td>
<td>Allows users to enter any combination of letters and numbers, up to 255 characters.</td>
</tr>
<tr>
<td>Text Area</td>
<td>Allows users to enter up to 255 characters in multiple lines of text.</td>
</tr>
<tr>
<td>URL</td>
<td>Allows users to enter any valid web site address. When users click on the field, the URL will open in a separate browser window.</td>
</tr>
</tbody>
</table>
Action:
You’ll want to customize the standard picklists and create custom fields for:
- Tasks
- Events
- Activity Custom Fields
- Leads
- Accounts
- Contacts
- Opportunities
- Cases
- Solutions
- Campaigns
- Users

Click Setup at the top of any salesforce.com page. Then click Customize. Click the appropriate tab, activity, or users link, and then click the Fields link.
In the Standard Fields section, click Edit to customize the standard picklists. In the Custom Fields section, click New to create custom fields.

Set Field-Level Security

Use field-level security to restrict users’ access to view and edit specific fields on detail and edit pages and in list views, reports, Offline Edition, search results, and when synchronizing data. Field-level security is set based on user profiles, so every user with a particular profile will have the same overall access to salesforce.com fields.

Action:
You’ll want to customize the field-level security for every profile. Click Setup at the top of any salesforce.com page. Then click Manage Users | Profiles. Select each profile individually to set the field-level security for that profile.

Customize Page Layouts

To tailor salesforce.com to your organization’s needs, you can customize the layout of the fields and related lists that appear on the different tabs. You can show, hide, or reorder the related lists. For both the standard and custom fields, you can choose the order of the fields and which fields to show, hide, require, or make read-only on the layout.

For the Reports tab, you can create new report folders, customize which reports go into each custom folder, and specify which users can view reports in the different folders.

Action:
You’ll want to customize the page layouts for:
- Tasks
- Events
- Leads
- Accounts
- Contacts
- Opportunities
- Cases
- Campaigns
- Reports

Click Setup at the top of any salesforce.com page. Then click Customize. Click the appropriate tab or activity link, and then click the Page Layout link. Follow the steps in the page layout wizard.
Set Up Email Templates

As an administrator, you can create letterhead and email templates for your organization to use with salesforce.com’s outbound email functionality. Using common templates can help you standardize customer communications and increase your organization’s efficiency. Salesforce.com outbound email functionality gives you the ability to send emails from the account, contact, opportunity, and case detail pages, and automatically log them as activities in the Activity History list.

- **Email Templates for Leads**
  - If you plan to use Lead Assignment Rules or Web-to-Lead, your organization will need email templates for:
    - Notifying customers that their online lead was received
    - Notifying users or queues that leads were assigned to them
- **Email Templates for Support**
  - If you plan to use the automated support features, your organization will need email templates for:
    - Notifying customers that their online case was received
    - Notifying customers that a case was manually created as a result of their phone call or email
    - Notifying users that cases were assigned to them
    - Notifying someone on your team that a case was escalated

**Action:**

To set up your letterhead, click **Setup** at the top of any salesforce.com page. Then click **Communication Templates | Letterheads**.

To set up your email templates, click **Setup** at the top of any salesforce.com page. Then click **Communication Templates | Email Templates**.

Set Up Mail Merge Templates

Salesforce.com and Hotpaper.com have joined forces to allow you to create custom form letters and other documents using information in your salesforce.com records. As the administrator, you can create templates with special "merge" fields and then upload those templates to salesforce.com. Your users can then generate Microsoft Word or Rich Text Format (RTF) documents from within salesforce.com.

**Action:**

Click **Setup** at the top of any salesforce.com page. Then click **Communication Templates | Mail Merge Templates**.

Customize Lead Settings

You need to customize the Lead Settings to specify your organization’s lead management defaults. For example, you can specify the default owner for all leads that are not properly assigned with your lead assignment rule.

**Action:**

Click **Setup** at the top of any salesforce.com page. Then click **Customize | Leads | Settings**.

Set Up Lead Queues

Lead queues can help your sales organization distribute leads to teams of sales reps. You can put leads into different queues, either manually or automatically via a Lead Assignment Rule as leads are generated from the web. Leads remain in the queue until they are retrieved by members of that queue. Only assigned members of a queue can take ownership of leads in that queue, so make sure that each sales rep is assigned to an appropriate queue.
Your organization may choose to create queues based on geographic area, corporation size, vertical markets, or any other criteria.

Action:
Click Setup at the top of any salesforce.com page. Then click Customize | Leads | Queues.

Set Up Lead Assignment Rules

Lead Assignment Rules allow you to route leads to the appropriate queues or users. Based on specific criteria in the lead (e.g., Industry equals Biotechnology), you can make sure leads are properly assigned as they are imported or generated from the web. You can also choose to enable email notification to users or queue members as leads are assigned automatically via an assignment rule.

Action:
Click Setup at the top of any salesforce.com page. Then click Customize | Leads | Assignment Rules.

Set Up Web-to-Lead

Web-to-Lead allows your organization to gather prospect information directly from your company’s web site and automatically generate up to 500 new leads a day. You can choose to assign incoming web leads automatically using a lead assignment rule, so each lead is distributed to the right sales rep or team who can respond quickly and appropriately.

You can use Web-to-Lead to create jump pages or microsites that capture lead information as part of a campaign. In this case, you can directly link the newly captured lead to an existing campaign.

You can also create Web-to-Lead auto-response rules to determine the email template to use when responding to leads captured online. You can create response rules based on any attribute of the incoming lead.

Action:
Click Setup at the top of any salesforce.com page. Then click Customize | Leads | Web-to-Lead.
To set auto-response rules, click Setup at the top of any salesforce.com page. Then click Customize | Leads | Auto-Response Rules.

Review the Automated Support Features

Salesforce.com’s Support Component contains a variety of automated features to help you automatically manage your workload, communicate effectively with customers, and increase your team’s productivity. Using the instructions on the next few pages, you will set up all of these support features.

- **Email Templates**
  If you plan to use the automated features, your organization will need email templates for:
  - Notifying customers that their online case was received
  - Notifying customers that a case was manually created as a result of their phone call or email
  - Notifying users that cases were assigned to them
  - Notifying someone on your team that a case was escalated

- **Case Queues**
  Allow you to manage your case workload or differentiate levels of service by distributing cases to a queue, rather than an individual user

- **Support Settings**
  Specify support defaults and email templates that are necessary for the automated support features to work correctly.

- **Case Assignment Rules**
Allow you to automatically assign cases to different users or put them in queues based on specific criteria in those cases

- **Case Escalation Rules**
  Help you manage how quickly your customers' issues are resolved, and automatically escalate cases that are not resolved in a specified period of time

- **Web-to-Case and Self-Service Portal**
  Allows your customers to submit their questions and issues directly on your web site, and automatically create a case using that information

## Set Up Case Queues

Case queues can help you **manage your customer support workload**. You can put cases into different queues as they are created, either manually or automatically via a Case Assignment Rule as cases are generated from the web. Cases remain in the queue until they are assigned to individual users, either by an administrator or another user. By initially putting cases in different queues, you can prioritize your cases and make sure the appropriate reps are working those cases.

As the administrator, you can create queues based on the expertise of your support reps, e.g., "Tech Support Level One" and "Tech Support Level Two" queues. You could also have queues based on the service contracts of your customers, e.g., "Gold Service Level" and "Silver Service Level" queues.

**Action:**

*Click Setup at the top of any salesforce.com page. Then click Customize | Cases | Queues.*

## Customize Support Settings

Next you need to customize the Support Settings to **specify your organization's support defaults and email templates**. You must complete the Support Settings for the automated features to work correctly.

**Action:**

*Click Setup at the top of any salesforce.com page. Then click Customize | Cases | Support Settings.*

## Set Up Case Assignment Rules

Case Assignment Rules allow you to **route cases to the appropriate queues or users**. Based on specific criteria in the case (e.g., Product Area equals web site), you can make sure cases are properly assigned as they are generated from the web. When creating or editing a case, users can also choose to automatically assign that case using the Case Assignment Rule.

**Action:**

*Click Setup at the top of any salesforce.com page. Then click Customize | Cases | Assignment Rules.*

## Set Up Case Escalation Rules

Case Escalation Rules can help you **make sure that your team is responding to customers as quickly as possible**. In an escalation rule, you can specify that cases with specific information should automatically be escalated if they are not resolved within a specified time period. For example, you may want to set that all cases with "Service Level equals Gold" be escalated if they are not resolved within 4 hours.

In addition you can set your support team's hours of operation so that escalation rules apply only during business hours.
Set Up Web-to-Case

Web-to-Case allows your organization to gather customer feedback and inquiries directly from your company's web site and automatically generate up to 500 new cases a day. Capturing case information online allows you to manage and track customer inquiries and to respond quickly to each customer, increasing customer satisfaction and your team's productivity.

You can also create Web-to-Case auto-response rules to determine the email template to use when responding to customers who submit cases online. You can create response rules based on any attribute of the incoming case.

Action:
Click Setup at the top of any salesforce.com page. Then click Customize | Cases | Web-to-Case.
To set auto-response rules, click Setup at the top of any salesforce.com page. Then click Customize | Cases | Auto-Response Rules.

Set Up Solutions

Solutions are detailed descriptions of a customer issue and the resolution to that issue. They allow you to capture and share your Customer Support team's knowledge so you don't have to solve the same problems over and over. By creating and maintaining a collection of solutions, your Customer Support team can respond quickly to common customer issues, thus increasing the team's productivity. The key to creating and writing good solutions is making them reusable, findable, and technically accurate.

Action:
Click Help at the top of any salesforce.com page. Then click Tips in the upper left task bar of the help window. Download the "Tips & Hints for Solutions" tip sheet to review guidelines for writing good solutions.

Set Up Custom Reports

Reports are powerful tools to help you view and analyze the data in your organization. Salesforce.com provides a number of standard reports; you can also create your own custom reports. The reports are flexible and can show the data in tabular, summary, or matrix formats, as well as in various charts and graphs. The ability to add custom fields enhances your reporting capabilities.

The reports are separated into folders. Using the Report Manager, your organization's administrator can add new folders, customize the folders, and specify which groups of users can view the reports in each folder.

- My Personal Custom Reports - personal custom reports you have created and saved
- Unfiled Public Reports - shared custom reports created by an administrator, but not saved into a custom report folder
- Account and Contact Reports
- Opportunity and Forecast Reports
- Sales Reports
- Lead Reports
- Support Reports
- Campaign Reports

From the Reports tab you can:
• View and select reports in different folders
• View and select all reports you have customized and saved
• Organize your Reports tab by moving report folders up or down

Within an existing report you can:
• View your report data
• Change the parameters of the report and rerun it
• Drill down by role in the organization's hierarchy
• Export your report to Excel
• Show a chart
• Save the report
• View and sort by custom fields
• View managerial reports
• Display a quarterly forecast summary (includes roll-up functionality)
• Report on opportunity sources (includes lead sources)
• Create a custom opportunity report
• Run a report on tasks and activities (includes all activities)

Some of the key standard reports are:
• Tasks and Appointments - Run this report to view your activities or your team's activities. To see the activity comments in the report, click Customize, go to Step 4 of the report wizard, select the Full Comments box, and click Run Report to display the modified report.
• Mailing List - Run this report to gather addresses to perform a mass mailing using Microsoft Word. Export the report to Excel. See the "Salesforce.com Mail Merge Process" document for instructions on doing a mass mailing with report data. Click Setup at the top of any salesforce.com page, click Administration Setup, and choose the CRM Rollout Guide link on the page. Click the System Configuration link from the opening page, and then click the Set Up Custom Reports step. You can download the document from this page.
• Key Contacts - Run this report to analyze which contacts are associated with your sales opportunities.
• Opportunity Pipeline - Run this report to see your sales pipeline. You can customize the report to review the pipeline by sales rep, stage, or any custom field that you have created.

Action:
1. Review any reports you previously used. Identify any new information that you want to analyze and track.
2. Identify the source of the data (e.g., accounts, contacts, or opportunities) and which fields are needed to generate the reports.
3. Follow the instructions in the online Help to create the reports you need. Click Help at the top of any salesforce.com page, expand the Reports folder of the help table of contents, and click the Customizing Reports topic for complete instructions.

Attend Training:
For more thorough report training, please attend the Reporting training class. Click the Training link at the top of any salesforce.com page to view the training schedule and sign up for the class. Or, contact salesforce.com's Customer Support team by clicking the Support link in the top right of any salesforce.com page.
Set Up Web Integration Links

As the administrator, you can create web integration links to integrate your salesforce.com data with other systems. The links can be directed to external URLs, to your intranet, or even to another salesforce.com page. You can also include salesforce.com fields as tokens to be passed to the URL. The web integration links display in the Useful Links section of the record detail page.

For example, you can create a web integration link for accounts that searches for an account name on yahoo - http://search.yahoo.com/bin/search?p={!Account_Name}.

Action:
You'll want to create web integration links for:
- Leads
- Accounts
- Contacts
- Opportunities
- Cases
- Campaigns
- Users

Click Setup at the top of any salesforce.com page. Then click Customize, select the appropriate tab or users link, and click Web Integration Links. Click New to create web integration links.

Agreement on System Setup

Demonstrate your initial salesforce.com setup to the relevant team members to reach a consensus on the design.

This is a key step in the acceptance of using salesforce.com. Once you have tailored picklists, added custom fields, etc., gather the group that went through the Business Process Review and get their buy-off on the changes that were made. Make any changes and reconfirm.

Some of the items to include:
- Customization of Screens - do you have all the fields you need and the appropriate values in the picklists?
- Leads
- Accounts
- Contacts
- Opportunities
- Cases
- Solutions
- Campaigns
- Tasks and Events
- Documents
- Users - is everyone set up that needs to be?
- Role Hierarchy
- Sharing Model
- Custom Reports
- Email and Mail Merge Templates
- Does salesforce.com meet your requirements as discussed in the Business Process Review?

Action:
Ask all relevant team members to review the initial setup of the items listed above.
Section 3: Data Management/Migration

Data Management/Migration involves all of the steps necessary to transfer your existing data into salesforce.com. Click the Next button for additional information to assist you with each step.

Data Management/Migration Steps:

1. Agree on Naming Conventions
2. Attend Advanced Importing Training
3. Review Import Tip Sheet
4. Import Data

Agree on Naming Conventions

Account Naming Convention:
We recommend that you create multiple accounts for each company - one main (parent) account to store the corporate headquarters information and additional accounts for each office location. This allows you to associate individual contacts and opportunities to the correct office location.

For a company with three different offices, you can create four distinct accounts - one for the corporate headquarters and three additional accounts for each location. Use the same company name (e.g., Acme.com) for each account, and enter the office location (e.g., Headquarters or New York) in the Account Site field. You can also associate each of the three locations to the corporate headquarters via the Parent Account field. The account hierarchy feature then allows you to see a global view of the parent company and all of its locations.

Opportunity Naming Convention:
We recommend that you name each opportunity with the company name followed by the product (e.g., Acme.com - 25 Licenses). This allows users to search for opportunities quickly when trying to associate task and events to a specific opportunity.

Attend Advanced Importing Training

We recommend that your Data Migration Specialist take the Advanced Importing Training class. The Import Wizards have step-by-step instructions, but this session covers importing in detail and includes tips and hints.

Action:
Click the Training link at the top of any salesforce.com page to view the training schedule and sign up for the class.

Review Import Tip Sheet

The importing tip sheet contains instructions and tips on data preparation and import.

Action:
Click Help at the top of any salesforce.com page. Then click Tips in the upper left task bar of the help window. Download the "Importing Your Organization's Data" tip sheet.

Import Data

As an administrator, you can import up to 50,000 records per import. We strongly recommend that you first do a sample import of a few records to verify the data mapping.
NOTE

Individual users can also import their own data, up to 500 records per import. You may choose to have your users handle this themselves. We find that organizations that handle the data migration for their team typically get a higher adoption rate; however, once salesforce.com is adopted, users may want to import additional files of their data.

Action:

*Click Setup at the top of any salesforce.com page. Then click Data Management and select the Import Accounts/Contacts link.*
Section 4: Rollout

Rollout involves all of the steps necessary to **start your team using salesforce.com**.

**Rollout Steps:**

1. **Activate All Users**
2. **Invite Users to Take Training**
3. **Email Training Reminder to Users**
4. **Schedule Kickoff Meeting**
5. **Create Kickoff Agenda**

### Activate All Users

If you had previously created users and had not activated them and/or sent them their password, you need to do this so users can sign up for training and begin using salesforce.com.

**Action:**

Click **Setup** at the top of any salesforce.com page, click **Manage Users**, and click the **Users** link.

### Invite Users to Take Training

**Email your users with instructions to take training** (see the sample email below). As a reminder, all users must have their username and password. If they do not, please go to the Users page, and reset passwords for those users.

**Action:**

Copy the sample email below, modify it if necessary, and email it to everyone in your team who will be using salesforce.com.

**Sample Training Email:**

```
From: Your Company's Project Manager
To: Your Team Members
Subject: Salesforce.com Training

As the next step in our plan to roll out salesforce.com, you need to sign up and attend the appropriate training session. You should have received an email with your username and password to log in to our organization's account. If you did not receive a username and password or are having trouble logging in, please let me know, as you have to be logged in to sign up for training.

Once you are logged in, you can click the Training link at the top of any page and choose the link for the appropriate class to schedule yourself for a FREE live training session. The training is conducted using a Web Presentation tool and conference call, so all you need is a phone and access to the Internet with a browser. Once you have registered, you will receive detailed instructions for attending the session via email. Please note that the training sessions are mandatory and need to be completed by our kickoff meeting on (enter date).

Regards,

Project Manager for salesforce.com Rollout
```
Sample Reminder Email:
From: Your Company’s Project Manager
To: Your Team Members
Subject: Salesforce.com Training Reminder

Just a reminder - if you have not already signed up and/or taken training for salesforce.com, you must have completed the training by (enter date). If you have any questions or issues with this, please let me know as soon as possible.

Regards,
Project Manager for salesforce.com Rollout

Schedule Kickoff Meeting

Schedule a kickoff meeting to go over company-specific business processes. This meeting is required for all users and is another key step in the successful rollout of salesforce.com (see sample email below). Consider this meeting your kickoff and schedule it close to or on your "go-live" date. All users should have recently completed training and be ready to start using salesforce.com.

Action:
Copy the sample email below, modify it if necessary, and email it to everyone in your team who will be using salesforce.com.

Sample Kickoff Meeting Email:
From: Your Company’s Project Manager
To: Your Team Members
Subject: Salesforce.com Kickoff

Mark your calendars! Our kickoff for salesforce.com is DAY, DATE, TIME at LOCATION. The goal of this training is to provide each attendee with the ability to do the following:

- Navigate around salesforce.com
- Create salesforce.com records
- Use salesforce.com as your CRM portal to manage your customer relationships
- Forecast your opportunity pipeline
- Run reports

Everyone needs to have attended training by our kickoff date, so if you have not already done so, please do so ASAP!

We look forward to rolling out salesforce.com!

Regards,
Project Manager for salesforce.com Rollout

Create Kickoff Agenda

Using the sample agenda below, create an agenda for your company's kickoff meeting.

Sample Kickoff Agenda:
- Introduction by Management
- Salesforce.com Site Overview
- Review Customization
- Discussion of Goals and Metrics
• Available Resources - Training, Support, Online Help
• Q & A

**Introduction by Management** - Review the reasons why salesforce.com was selected.

**Salesforce.com Site Overview** - Give an overview of the service. Navigate briefly to all the screens.

**Review Customization** - Cover the customizations made based on the information from the Business Process Review. Navigate to all appropriate screens. Go over the processes to be implemented for using the system.

**Discussion of Goals and Metrics** - The way your team will use salesforce.com is typically set during the first few weeks of use. Teaching good habits early is critical! Therefore, make sure your users have a guideline of what you want them to accomplish with the service on a short-term and long-term basis. Set goals for the users and announce them during this meeting. For example, let them know they have to enter a certain number of opportunities and forecasts by a certain date and a certain number and type (calls, presentations, etc.) of activities for a day, week, and month. Also, review your business process guidelines for salesforce.com and cover any issues that have to do with using the service. Listed below are some sample tasks you can have your users complete when they begin using the service.

**Available Resources** - Go over all available options. Spend time covering how to use all of the options available in the online Help and explain each section in detail.

Sample Tasks for Users to Complete:

**Training**
- Take training classes (at least one)
- Review the online Introductory Tutorial
- Download and print the Tip Sheets in the Help for quick reference (Click **Help** on any page and choose **Tips** in the upper left of the Help window.)

**Enter Important Data**
- Add your opportunities that are closing this quarter
- Create your forecast for this quarter and next
- Add your quota assignments for this quarter and next
- Add the tasks & meetings you have for the rest of this month

**Synchronize Your Data**
- If you use Outlook or a Palm device, learn how to synchronize your calendar and tasks

**Make it Personal!**
- Personalize salesforce.com to display the information that is most important to you
- Set your email signature
- Enter your frequently-used email templates
- Forward your Word templates to your administrator to upload for mail merge
- Set your locale & time zone
- Create your own custom reports
Section 5: Follow-Up

Follow-up involves all of the steps necessary to make sure that your team is using salesforce.com successfully.

Follow-Up Steps:
1. Monitor User Activity
2. Hold Follow-Up Meetings

Monitor User Activity

As the administrator, you have the ability to see the last time each of your users logged in and which trainings they have taken, so you can verify that they are using salesforce.com as outlined in your goals and metrics.

Action:
- View the Login History to see when each of your users last logged in - Click Setup at the top of any salesforce.com page. Then click Manage Users | Login History.
- Review the Training Class History to see which classes each user has taken - Click Setup at the top of any salesforce.com page. Then click Manage Users | Training History.

Hold Follow-Up Meetings

These meetings can be done in person or via phone once a week for the first four weeks of use. The main purpose is to make sure that everyone is using the system and using it correctly, as well address any questions or issues. Make sure that everyone is working on or has completed the tasks listed below.

Tasks for Users to Complete:

Training
- Take training classes (at least one)
- Review the online Introductory Tutorial
- Download and print the Tip Sheets in the Help for quick reference (Click Help on any page and choose Tips in the upper left of the Help window.)

Enter Important Data
- Add your opportunities that are closing this quarter
- Create your forecast for this quarter and next
- Add your quota assignments for this quarter and next
- Add the tasks & meetings you have for the rest of this month

Synchronize Your Data
- If you use Outlook or a Palm device, learn how to synchronize your calendar and tasks

Make it Personal!
- Personalize salesforce.com to display the information that is most important to you
- Set your email signature
- Enter your frequently-used email templates
- Forward your Word templates to your administrator to upload for mail merge
- Set your locale & time zone
- Create your own custom reports