

Choosing Salesforce as a CRM

Typical Lifecycle



Key Considerations for adopting Salesforce

1. **Buy In:** successful implementation of Salesforce will require the buy-in of the senior management team, trustees and other key staff involved. The [organisation name] is responsible for ensuring that this has been sought from the relevant stakeholders.
2. **Time and capacity during implementation:** the implementation of Salesforce will involve time and input from the key members of the [organisation name] who will use the system. The [organisation name] should ensure that the relevant people have the necessary time and capacity to engage in the activities during the project. If you do not have expertise in house, you may need to engage a freelance consultant or Salesforce consultancy to support you setting up the system. The roles and responsibilities of the key people at your organisation involved in setting up and managing Salesforce are set out in [Appendix 1](#) below.

3. **Priorities:** the [organisation name] should work to identify its requirements and [prioritise](#) these according to the level of need, urgency etc. It isn't essential to fully know all requirements for all areas of work, as the system can be built in stages using Agile principles.
4. **Ongoing maintenance and development:** once the system is set up, the [organisation name] will need to appoint someone to manage and maintain it. This usually involves a System Administrator, as well as an in-house Champion who supports the roll out, adoption and continued development of the system. This can be the same person. The roles and responsibilities of these people are set out in [Appendix 1](#) below.
5. **Training and adoption:** the [organisation name] will need to factor in time and budgets for training to use Salesforce. Salesforce has its own dedicated training system called Trailhead where users can learn about Salesforce functionality, and practice using and configuring it in a testing environment. It is typically recommended that the Salesforce Administrator (and others if budget allows) undertakes formal training in Salesforce Administration.
6. **Licenses and budgeting:** if approved, **10 free licenses** will be provided under the [Power of Us Program](#). The [organisation name] should consider whether these are sufficient, and if not whether they have the budget to cover [additional licenses](#).
7. **Ongoing support:** The [organisation name] should give consideration for how ongoing support could be managed. If you do not have technical expertise in-house you may need to pay a consultant or consultancy firm for technical support.
8. **Data migration:** There is often considerable time and effort involved in preparing 'old' data to fit into a new system. If you need to transfer old data into Salesforce, this should first be 'cleaned up' to make sure you only bring over good quality data. Sometimes data can be uploaded in bulk, but this may require you to restructure existing data to match the equivalent fields in Salesforce. Otherwise, data can be added manually but you will need to allow more time for data entry. You can also decide on a cut off point for older data and start using Salesforce for 'new' data only.
9. **Third Party applications:** the off-the-shelf system does not currently include any third-party applications. If you need to extend functionality you might be able to find an app on the Salesforce App exchange. There may be additional costs for third party applications. Some are discounted for nfps.
10. **GDPR:** Salesforce has undertaken considerable work to ensure its system complies with data protection legislation. You can read more about their approach to [GDPR compliance](#) on their website.

How to evaluate success?

Here are some example measures of success you could use throughout the project, during project management meetings, at the 'end' of the implementation, and through ongoing support and thereafter to understand how the system is helping to achieve your goals.

Stage	Goals and Checklists
Design Stage	<ul style="list-style-type: none"> • Relevant users consulted • Clear motivations • Clear measures of success • Thorough design processes • Signed off by management
Implementation	<ul style="list-style-type: none"> • Management buy-in and ownership • Documentation – process maps and Manual • In House Champion • Investing in Training
Application	<ul style="list-style-type: none"> • Regular monitoring of data quality • Ongoing support, updates and maintenance • Use of system within performance management • User adoption
Overall	<ul style="list-style-type: none"> • Does the system produce the desired reports and outputs? • Is it simple for the end user to navigate? • Are operations more streamlined? • Has team admin reduced / speed of work activity increased? • Is data being captured where it is needed? • Linking back to LC goals

Appendix 1: Key Responsibilities of the [organisation name]

Implementation Team

Depending on the size of the [organisation name], the following roles may be allocated to different people, or combined into one or more roles.

Project Owner

Will have ultimate responsibility in the [organisation name] for decision making, strategy and goal setting. They will be responsible for ensuring the relevant people are involved in the project, that buy in has been sought and for communicating the implementation plan within the relevant people. They should be involved at all stages of planning, scoping, ongoing project management and handover. They do not need to have technical expertise but would benefit in undertaking Salesforce training to properly understand the system and functionality. They will work closely with the Project Manager to ensure the project is on track and meeting anticipated goals.

Project Manager

Will have responsibility for planning, maintaining accountability and managing resources to deliver the project. They will need to liaise with other team members, keep the project on track and on budget, ensure the project is aligned to goals and priorities. They will be involved in project management workshops, scoping workshops, design phases, testing and handover. They do not need to have technical expertise but would benefit in undertaking Salesforce training to understand the system and functionality. They will work closely with the Project Owner, System Administrator and Power User to ensure the project is on track and being used to the best advantage.

System Administrator

Will have responsibility for setting up and managing the back end of the system. They will be involved in all stages of the project. It is recommended that the System Administrator undertake approved Salesforce Administrator training and completes the recommended Trailheads to fully understand the functionality of Salesforce and how to administer it. Going forward, this person is key to the continued development of the System, as well as supporting other users with training needs and refining and adapting the system as the [organisation name]'s needs develop. System Administrators usually have access to all data on the system.

System Administrators may also have non-technical expertise, for example, they typically they act as “first-line” support for functional-related topics; help answer process and “How To” questions; present new features to other users; provide support or deliver training for other users; hold frequent meetings with other Super Users on a regular basis to gather feedback regarding new and current initiatives; provide peer-to-peer best practice sharing; attend on-going Salesforce training sessions as new features and functions are deployed.

Power User / In House Champion

Will have responsibility for championing the System within the organisation. They will be involved at all stages of the project. They support the System Administrator in the non-technical elements of Salesforce planning, development and adoption. They may be granted some basic System Administrator privileges to support minor technical changes.

For Further Information

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