

HOW TO Navigate a Successful Salesforce IMPLEMENTATION



Complexity vs. Value

Don't be penny wise and pound foolish. Optimize your time and follow the 80/20 rule: focus on the things that will have the biggest impact on the biggest portion of your user base.



Customer Experience

Have a conversation with the customer and don't forget that they're a user of the CRM too, and their feedback can be invaluable.



Data, Data, Data

Use this opportunity to take control of your database - normalize various field types (especially title, industry and address fields,) merge duplicate records and append data to build a more complete database.



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Work From The Bottom Up

Having a quick conversation with your CRM users can have a huge impact on your implementation. Involve your users! They're important too.



Process and Technology

Define your process before building your solution and leverage outside help. It's important to get opinions from outsiders.



Own Your Data

Define data ownership, which includes maintenance responsibilities. Focus on pre-data cleanup but also ensure that your data is protected - otherwise it will revert back to the huge mess that you spent so much time cleaning up! Lastly, by employing data enhancement tools and strategies, you are ensuring the biggest ROI on CRM and marketing automation technologies.

Make sure you're on the right path!

RingLead creates easy-to-use, yet powerful applications that will keep each record in your database normalized, unique and complete. Contact us to take the first step toward data quality.

