



OUR SMALL BUSINESS SALESFORCE IMPLEMENTATION PLAYBOOK

- 1** Define the Project Scope, Plan and Budget
- 2** Choose the Right Edition and think about how the business will grow
- 3** Give Sales Teams the Tools they need to do their job
- 4** Understand your Sales Process and what information you need
- 5** Implement a 'What next?' methodology for each sale
- 6** Define the KPIs - what, why and how they will be measured
- 7** Make Salesforce the single source of truth for Sales data
- 8** Ensure your data is accurate, complete and adds value
- 9** Build Business Processes on Salesforce
- 10** Establish Salesforce as the Go To place for Senior Management