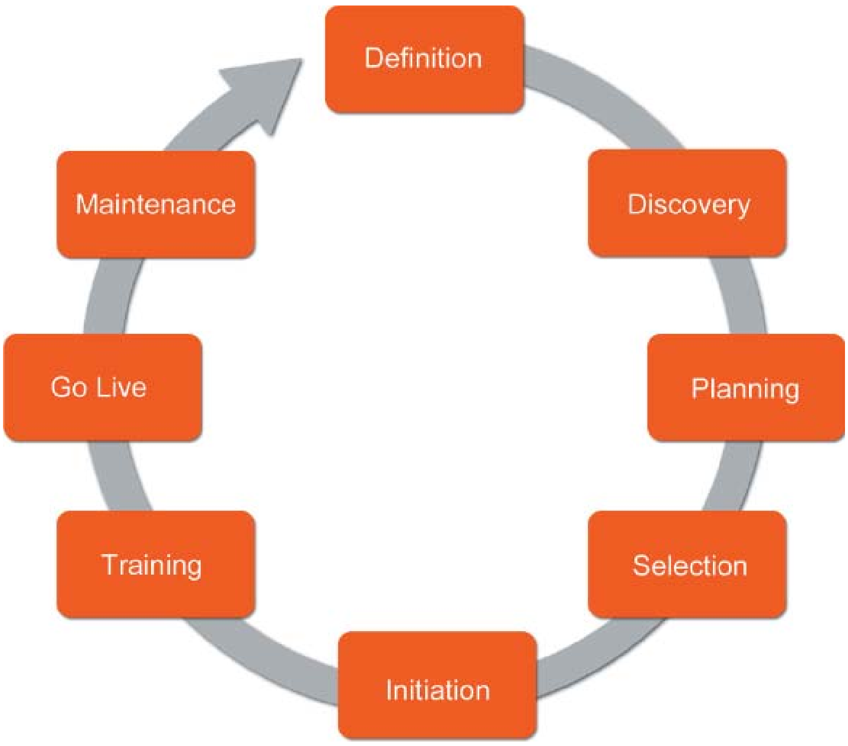
Keys to Success
for Implementing Salesforce.com

After hours, weeks, or potentially months of evaluating all of the available CRM options, you have chosen Salesforce.com to support your customer and business information. Congratulations! You're excited about the potential within the Salesforce.com platform that your Account Executive described to you, and are ready to begin. So, now what? If you have decided that you do not want to implement Salesforce.com on your own and are looking for professional guidance to ensure you see the most ROI from your purchase, then you need to begin to evaluate consulting partners. Salesforce.com certified consulting partners can ensure that you start off on the right foot and build for now and for future growth. This white paper will help you plan your implementation project. This document also includes answers to your burning questions about choosing a consulting partner from researching firms to maintaining your instance.

There are eight phases to a Salesforce.com implementation project:



Implementation Project Phases

Definition:

Defining your organization's goals and business processes impacted by the new application.

Discovery:

Finding your data, your internal team, and potential consulting partners.

Project planning:

Mapping out the project plan: the timeline, the customizations, add-ons and additions, data migration, and your budget.

Team selection:

Selecting your internal team, project leaders, stakeholders, and consulting partner.

Project initiation and action:

Beginning the project tasks that support the discoveries and definitions from previous project phases.

Training:

Learning about the application, your installation, and launch preparation for your users.

Go-Live:

Launching and using your instance.

Maintenance:

Completing transitions and monitoring your usage and adoption. Also includes ongoing maintenance and support.

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Why do I need a consultant to implement and setup on demand software like Salesforce.com? Isn't it just a web application?

After weighing all of the options, you chose to use on-demand, because it was easier to implement and easier to maintain. But your business is not one-size fits all, and your Salesforce.com instance will not be either. Salesforce.com is one of the leading on-demand technology platforms, and gives your business access to its critical needs, in the "cloud," and not your server room. Although the application is delivered over the web, Salesforce.com is a powerful platform offering the same set of features as traditional on-premise software. In order to get started with on-demand you'll need to:

- Map out your new business processes
- Customize your application to match your business
- Migrate your data
- Connect your critical applications: accounting, invoicing, inventory management, product management, content management and others
- Train your team

Your team is busy with their day-to-day activities supporting your business operations and making sure your business is successful. A consultant (or team of consultants) can come in and unburden your team from implementing your new applications. This ensures it will be ready when you are ready to "go-live." Your services engagement will help you to, for example: understand your current processes, map your processes to the new tool, customize the new tool to match your process, setup your user permissions, connect other applications, and train your team to use Salesforce.com. Also a certified Salesforce.com consulting partner should come bearing a quiver of Salesforce.com best practices from hundreds of deployments and will help you avoid common mistakes and pitfalls organizations can make without the requisite experience.

How can I define the scope and goals of my project?

The first step to understanding the scope of the project is to understand how your business works, and your motivations for making the change to a new application. You will need to uncover: how you acquire new customers, your customer lifecycle, your customer service process, and your product introduction and lifecycle process. Each of the primary functions of your business may play a role in your new Salesforce.com implementation. You will also need to review your organization's calendar. Are there critical events that coincide with your project timeline? The end of the quarter? The end of the year? A critical new product release? An office move or a batch of new hires? These events may be critical to your implementation timeline. Next, take some time to understand which of these processes and teams will need to be mapped to your Salesforce.com instance. You should also spend time defining your success metrics - what needs to happen to ensure your users adopt this new application or for your team to approve the transition.

Before starting your search ask yourself if you have:

- Mapped out your business processes
- Identified your internal team
- Defined any custom functionality or connections your organization will need to implement
- Analyzed current state of data
- Determined which data needs to migrate to the new system
- Defined a project budget and timeline
- Created a list of success factors for your project
- Identified and located all data sources

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Do I need to migrate my data, and how do I do it?

Data migration can be a complex process when you move from one customer relationship management system to another, but it is much easier if you are just moving customer contact information. Your consulting team will have familiarity of the different methods of data migration, and the tools to accomplish this portion of the project. In order to scope out your data migration needs, be prepared to help your consultant understand what your data looks like, where it is located, and how it should be organized in the new system.

In order to understand your data migration needs, consider the following questions:

- Where is my customer data located: in a spreadsheet, in an email program, in a custom database, in a CRM application, or multiple sources?
- What other information is connected to the customer records: invoices, notes, emails, sales projects, quotes, proposals, support tickets, documents, product registrations?
- Something else?
- How much of your data is current?
- How much data is critical to transition to the new system?
- Can your data be integrated in phases?
- What is the priority of each type of data?
- What are the “nice to haves” vs. “have to haves”?
- When do you need to have data available in the new system?
- How should you handle data records from employees that are no longer working at your organization?

How can I find a consulting partner for implementation?

There are many resources available to find a consulting partner, but the best way to find one is to ask people in your current network of contacts or with the vendor you are working with.

- Ask your colleagues and professional network
- Ask your sales representative to recommend a partner with experience implementing similar organizations or similar projects
- Start a discussion on a LinkedIn Group or other online forum
- Search the Web
- Look in Industry directories

Data Migration Tips for Success

- Define the location of all of your important data
- Figure out how the data is connected to each other, and how it is broken out
- Classify your data into: current and critical, current and optional, or junk
- Outline data access rules based on roles and business processes

Did you know?

Migrating from large and small databases alike can be made easy with the right partner. Echo Lane has successfully migrated data from a myriad of systems including but not limited to: ACT, Onyx, Pivotal, Maximizer, Goldmine, SageCRM, Siebel on Demand/UpShot, Oracle, MS CRM, SugarCRM, Netsuite, SalesLogix, Outlook, Excel, home grown applications and more.

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How do I figure out if the organization is the right fit?

One thing research will not help you figure out directly is if the consultants are a good fit for your organization. Not only is it critical to identify a team with the right experiences, you also need a team that will mesh well with your organization. Do you have a similar approach to solving problems, similar work and communication styles? Similar business hours? This component of choosing a consultant is typically overlooked, but is critical to the success of your project. You are not looking necessarily for a new friend, but choosing a consultant is similar to choosing a new employee, but the terms of the relationship are well established up front. To make sure the firm is a good match, meet with the consultants several times, and invite all of the critical team members who will be working with the consultants day to day, as well as the project managers. After these meetings, talk to your internal team, and key stakeholders to reach a consensus on which consulting firm to choose.

How can I tell if a firm is qualified?

Focus on understanding the firm's level and depth of experience: inside of the Salesforce.com application, with AppExchange partners, and real world experience. Any potential partner should have hundreds (or more) projects under their belt, and experience with organizations similar to yours: industry, size, complexity or environment. The organization should also have plenty of references. Ask for case studies as well as the names of customers with similar implementations. Do your due diligence, and call each reference to find out:

- How the project went?
- What, if any, challenges came up?
- How challenges were resolved?
- How the organization is using Salesforce.com today?
- How they'd like to use Salesforce.com in the future?
- What they'd recommend if they started a new engagement, knowing what they know today?

Finding and choosing a consultant:

- Ask your colleagues and business partners for recommendations
- Ask your sales representatives
- Visit the Salesforce.com website and search for partners
- Use LinkedIn discussions to ask a question, get recommendations,
- and review your choices
- Ask the partner if they have Salesforce.com certified consultants on staff. There are many partners in the ecosystem but you want to be sure that the partner is qualified and has passed the requisite tests, certifications and Salesforce.com standards
- Ask the partner how many implementations they have completed and in what industries

Did you know?

- Echo Lane has been a certified select Salesforce.com partner since 2004 with over 800 successful implementations to date.
- Echo Lane has a team of Salesforce.com certified consultants and
- developers.

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Before we go-live with the new system, how will we be sure it is bug free and our team knows how to use it properly?

Software as a Service (SaaS) is still software, but delivered online. There are misconceptions about SaaS that assume because it is delivered via a web-browser; it is as simple as reading the news online.

Your team will have a new workflow and process to use your new application, and some aspects of traditional software installation still apply. Ask your potential consultant about how they test and debug, and where it fits in the process. If the consultant tells you testing and quality assurance is unnecessary find a new candidate. After mapping this application to your business processes, user profiles will define information access, workflow rules will automate your processes, Third party applications may be installed, and you will move over your real customer data. It is critical to test each of these components individually, to make sure all automations trigger correctly, connections to Third party applications are working properly, and permissions and data access are consistent with your business rules. Depending on the scope and complexity of your project, you will want to allocate 5-20% of the total project time to testing and bug fixing.

Training is also critical to ensuring your team adopts your new application, and the transition goes smoothly. Each team member should undergo role-specific training to cover how to use the application, how to find the information they are looking for, and how the data is interconnected. After learning the basics, trainings should cover how to use the advanced features of the application, and the ways they can help you centralize all of your data and processes.

After launch, how do I maintain my new system?

Once you have finished the setup, customization, training, and launch, you and your team are in the home stretch. At this stage you should be well trained and well aware of how your system is configured. In order to ensure this phase of the project runs smoothly, confirm your consultants have given you documentation along the way explaining how the system was setup for you: you are looking for explanations on the roles and user setup, custom fields, workflow rules, automation and the custom applications or objects installed. These reference materials will be ideal tools to use to train new administrators and to refresh your memory on your instance of Salesforce.com.

What to ask during a reference check:

- How would you rate project success?
- What, if any, challenges came up?
- How challenges were resolved?
- How the organization is using Salesforce.com today?
- How they'd like to use Salesforce.com in the future?
- What they'd recommend if they started a new engagement, knowing what they know today?

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What if I have a problem after Go Live?

The first few weeks after your project's completion are critical. At this stage your users will be getting used to the new application, and your team is still learning how to use, maintain and support your new application. To make sure the transition is as easy as possible; negotiate upfront with your consultant about post-launch support, maintenance and training. You should make sure your consultants are available for a predetermined number of hours to help with the transition. You should also consider including a block of hours for ongoing support for any other issues that may come up early in the transition. Depending on the scope of your project 5-10% of the total project hours should be sufficient to handle these adhoc requests.

Conclusion

Choosing a consulting group for a critical business function does not have to be difficult and overwhelming. Using the tips included here, you will ensure a smooth transition to Salesforce.com that successfully matches your business and its unique challenges.

About Echo Lane

Echo Lane is an agile, success-focused professional services consulting firm dedicated to delivering software as a service (SaaS) with a focus on Salesforce.com and its partner ecosystem. Echo Lane has successfully delivered hundreds of client implementations and is one of the top Salesforce.com consulting partners, often working hand-in-hand with Salesforce.com to deliver strategic client work. The Echo Lane team brings a vast and deep pool of talent and expertise to solve client problems and deliver unmatched quality work.
Echo Lane's management and teams have sales, business process and on-demand technology experience from companies such as Salesforce.com, Oracle, Accenture, VeriSign, Inktomi, and Sun Microsystems.
Echo Lane has domain knowledge and solution expertise in key vertical markets, including but not limited to, Healthcare and Life Sciences, Financial Services, Insurance, Education, High Technology, Media, Wine, Energy and Non Profit. We service small business, mid market and enterprise clients alike, working with clients such as aQuantive (Microsoft), NEC Corporation of America, Blackbird Vineyards, Dwell Magazine, Heald College, VeriSign and more.

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