

Salesforce Implementation Checklist

For mid-market and enterprise Salesforce rollouts – print and use in workshops, UAT, and go-live readiness reviews.

Pre-implementation:

- Security model design completed (roles, profiles, permission sets, least privilege).
- Integration inventory completed with source/target systems, frequency, owners, and monitoring plan.
- System-of-record decisions made (accounts, products, pricing, invoices, entitlements).
- Data audit completed (duplicates, missing fields, inconsistent values) and remediation plan created.
- Future-state process map agreed with stage definitions and exit criteria.
- Current-state process map completed (lead-to-close, renewals, handoffs, approvals).
- Business objectives are documented with measurable success metrics (examples: forecast accuracy, cycle time, data completeness).
- Project owner is named (typically RevOps) with weekly steering cadence & decision rights defined.
- Executive sponsor is named and accountable for outcomes (adoption, forecast trust, revenue reporting).
- Governance model agreed (change requests, release cadence, data ownership, quality monitoring).
- Implementation scope finalized with phased rollout plan and risk register.

Implementation:

- Configuration completed for core objects, stages, record types, layouts, and required fields.
- Automation built using flows and approvals with documented business rules and exception paths.
- Custom objects and fields reviewed for necessity, naming standards, and reporting impact.
- Integrations built with error handling, retries, and reconciliation reports.
- Data migration mapping signed off and test migrations reconciled against source systems.
- Testing plan executed (unit, integration, UAT) with pass criteria and defect triage process.
- Reporting suite built (exec pipeline, forecast, activity, conversion, data quality).
- Security and access validated (role-based access, sharing, field-level security, audit requirements).
- Enablement plan executed (role-based training, manager coaching workflows, job aids).
- Go-live cutover plan approved with backout plan and hypercare schedule.

Post go-live:

- Adoption dashboards live (active users, key workflow usage, completeness by stage).
- Data quality monitoring live (duplicates, required field completion, integration exceptions).
- Reporting validated by leaders (pipeline, forecast, conversion, renewals) with sign-off.
- Commission and revenue-impact checks completed (owner history, effective dates, products, approvals).
- Integration monitoring and incident response process active (alerts, on-call, runbooks).
- Optimization backlog prioritized with release cadence and governance in place.
- Quarterly governance review scheduled (process changes, field standards, role changes, reporting needs).

Enterprise specific:

- Compliance requirements documented (data retention, privacy, access reviews, segregation of duties).
- Audit trails enabled for critical fields (discounting, close date, amount, owner, stage).
- Role-based access mapped to job functions and reviewed by security and business owners.
- Data ownership model defined (who owns what objects and data quality SLAs).
- Change management evidence stored (release notes, testing proof, approvals, training completion).

