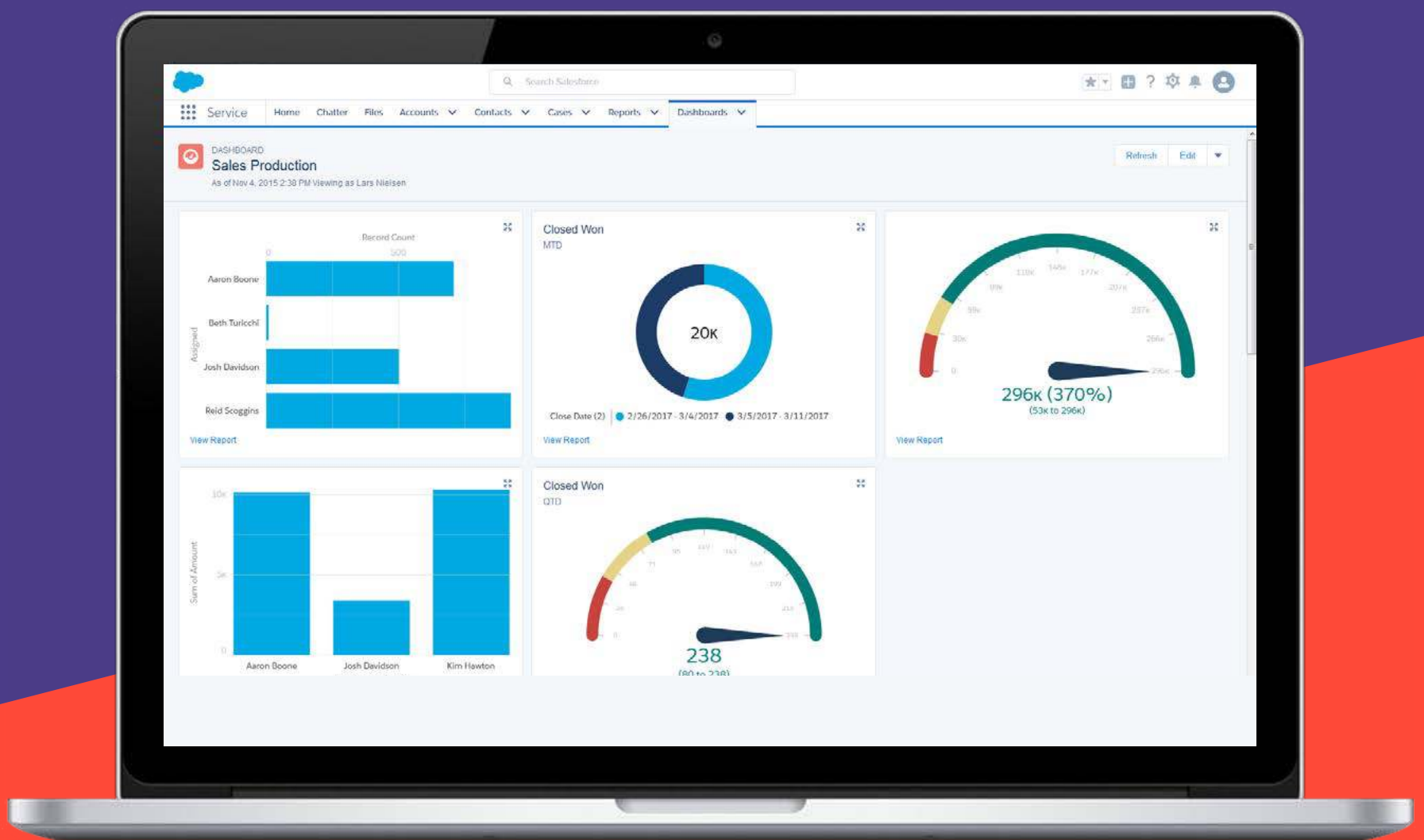


Improving Salesforce® User Adoption



A guide to turning your CRM into
a powerful tool that users will
actually want to use

Produced by the makers of **clouddingo**

THE THEORY OF A WELL-RUN SALESFORCE ENVIRONMENT SEEMS SIMPLE ENOUGH, **RIGHT?**

Your team has confidence in knowing which leads are ready to buy and which need more nurturing. Customer inquiries are automatically routed to the right agent. This month's pipeline is available at a glance with the click of a button.

And each morning salespeople login to Salesforce, make their calls, and the money rolls in.

But does your Salesforce org actually work like this? Why isn't all the data available at your fingertips?

The problem and, coincidentally, the solution: user adoption.

When users carelessly enter information in Salesforce, data gets skewed. Even worse is when users ignore the system entirely because the data is so bad and new data is never collected.

Poor user adoption is one of the biggest challenges of Salesforce. Without employees consistently adding to and utilizing Salesforce, your org is useless.

SO, HOW CAN YOU MAKE THE SEEMINGLY IMPOSSIBLE MISSION OF IMPROVING SALESFORCE USER ADOPTION POSSIBLE?

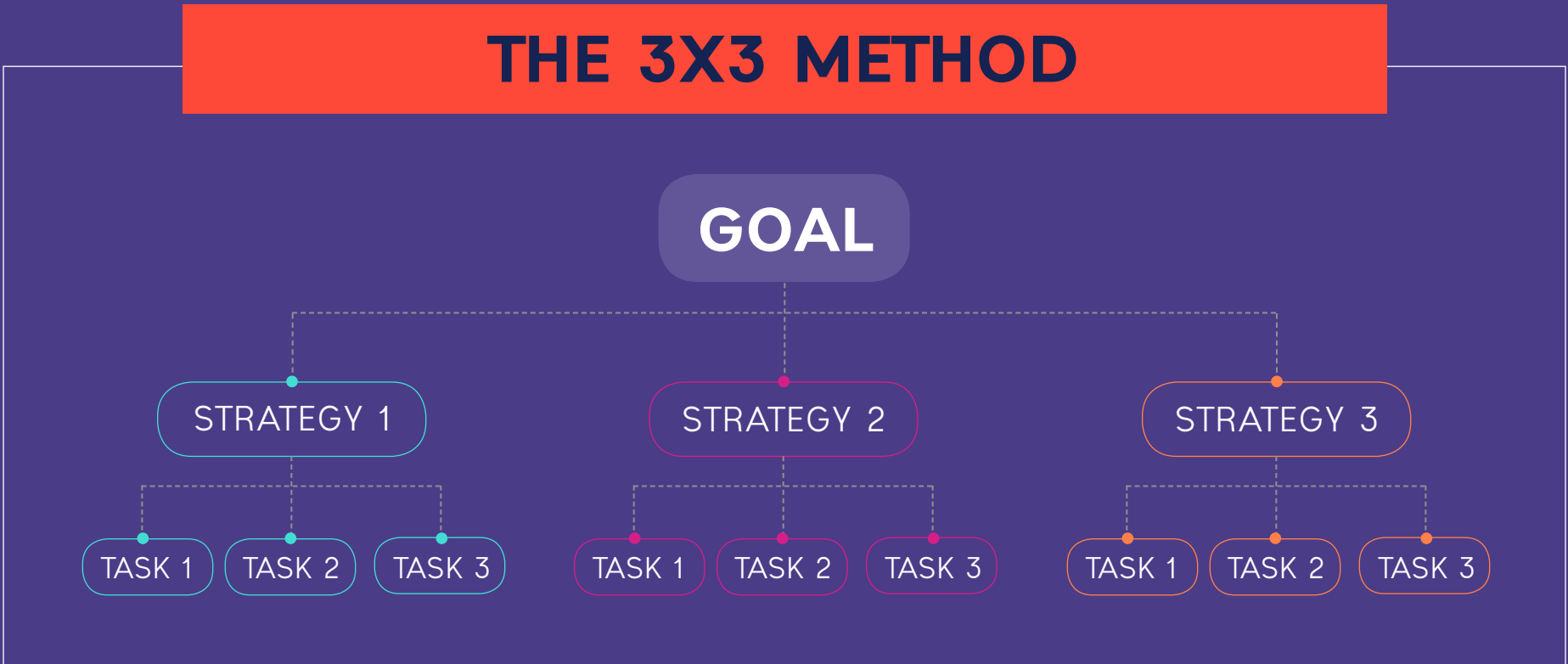
THE 3X3 METHOD

BREAK THE PROCESS DOWN INTO SMALL, DOABLE CHUNKS.

Try applying the 3x3 method.

Start with one goal.

Then define three strategies that will help you achieve that goal. For each strategy, give yourself three actionable tasks that will help you complete the strategy, thus completing the goal.



3 GOALS TO IMPROVE SALESFORCE USER ADOPTION

In this ebook, we've identified three goals that help improve user adoption. For each goal we've outlined the strategies and tasks needed to achieve the overall goal.



GOAL 1
IMPROVE DATA QUALITY

GOAL 2
EMPOWER USERS

GOAL 3
**INCREASE PRODUCTIVITY
& SUSTAINABILITY**



GOAL 1 IMPROVE DATA QUALITY

A COMMON COMPLAINT FROM SALESFORCE USERS WHO DON'T USE THE CRM IS THAT THEY DON'T TRUST THE DATA.

They search for a customer by name only to find three other records for the same person. Which record is the correct one? Or they run forecasting reports only to find that the data has been skewed by duplicated Opportunities.

Who could blame employees for not using the system when it's filled with dirty data? After all, you wouldn't use a calculator that told you $2+2=6$, so why expect users to rely on your org for reporting, activity logging, and business needs when the data is inaccurate and duplicated.

Another roadblock to user adoption that stems from poor data quality is having multiple data warehouses that don't speak to each other. Does your organization have a separate platform or marketing automation system that's not integrated with Salesforce? When datasets are not synced, sales reps become frustrated having to switch back and forth

between different programs to find the information they need. No wonder users end up just creating their own spreadsheets.

The first step to improving your data quality (and to aid user adoption) is to understand your data challenges. What are users complaining about? What are their frustrations? Think about instances where've you needed to do one-off corrections like deleting a record, deduping records, or correcting field values. More than likely those one-off corrections are frequent occurrences in your data and can be good hints as to where your data problems lay.

Once you've identified your problems, it's time to take action.

GOAL 1: IMPROVE DATA QUALITY

- STRATEGY 1: CLEAN EXISTING DATA
 - » Task 1 Eliminate duplicates that are already in Salesforce
 - » Task 2 Get rid of old data that has turned stale
 - » Task 3 Standardize, update, and enrich data
- STRATEGY 2: IMPLEMENT A DATA MAINTENANCE PLAN
 - » Task 1 Prevent dirty data from polluting your org
 - » Task 2 Enforce data entry standards and procedures
 - » Task 3 Assign responsibility to a data steward
- STRATEGY 3: MAKE SALESFORCE A "ONE-STOP SHOP"
 - » Task 1 Make Salesforce mandatory
 - » Task 2 Eliminate siloed data
 - » Task 3 Restrict outside workarounds

GOAL 1: IMPROVE DATA QUALITY

STRATEGY 1

CLEAN EXISTING DATA

The best place to start improving data quality, and the most common strategy, is to eliminate dirty data that is already present in Salesforce.

Dirty data has become a catch-all phrase. The most common example is duplicate records. But dirty data can also include anything from incomplete records that don't have enough useful information to junk records that have been entered with invalid information. Test data and nonstandardized data also fall into this category.

Think about dirty data as any data that compromises your business operations. Dirty data causes confusion, uncertainty, and results in inaccurate reporting. It can also lead to wasted marketing efforts and frustrates Salesforce users.

STRATEGY 1 CLEAN EXISTING DATA

TASK 1

- ☐ Eliminate duplicates that are already in Salesforce

- Profile your data to understand how many duplicates are currently polluting your org.
- Perform multiple cleaning “sweeps” of your records to catch all duplicates. First merge duplicates that are exact matches, then get progressively more ambiguous with matching criteria.
- Dedupe from the top down, starting with Accounts. This eliminates decisions about which Account your Contacts should be affiliated with and reduces the risk that new Leads or Contacts will get attached to the wrong Account.

TASK 2

- ☐ Get rid of old data that has turned stale

- Delete meaningless records. For example, if you only use phone and email to contact customers, and you have records with no valid phone number or email address, those records are useless.
- Delete inactive records that have no activity within a certain time period.
- Evaluate security protocols. Due to legal regulations some companies require that data should be deleted after a specified time period.

Clean your org today →

HOW MANY DUPLICATES ARE IN YOUR ORG?

Find out for free with Cloudingo!

The screenshot shows the Cloudingo dashboard for 'My Salesforce Org' with the 'Dashboard: Dedupe' view. It displays results for six different deduplication queries:

Query	Groups	Matches
#1 Leads (email + last name)	10908	21917
#2 Leads (full name + email)	1969	3938
#3 Contacts (email + last name)	53	-
#4 Contacts (email + full name)	-	-
#5 Accounts (account name)	-	-
#6 Accounts (name, state)	-	-

Each query section includes a 'MERGE' button and a 'Status' indicator (e.g., 'Last ran 14 minutes ago'). A 'salesforce available on AppExchange' badge is visible in the bottom right corner.

STRATEGY 1 **CLEAN EXISTING DATA (CONT.)**

TASK 3



Standardize, update,
and enrich data

- When new data points are introduced, ensure all records have updated information. You can do this by mass updating records.
- Verify and standardize addresses.
- Consider if geocodes would benefit your users. Geocoding can help better segment and categorize prospects using geographic, demographic, and political parameters.
- Decide what data is missing in your system that would be relevant to your business operations and seek third party companies that can fill in the blanks. Use caution and research how reputable the sourced data is.

GOAL 1: IMPROVE DATA QUALITY

STRATEGY 2

IMPLEMENT A DATA MAINTENANCE PLAN

Once data is cleaned, it's critical to take proactive measures to ensure data stays clean.

Think about your kitchen. You don't simply clean it up once and wait a couple weeks before doing the dishes again. It's much easier and takes less time if you clean as you go. The more frequently you do it, the better. And it doesn't necessarily mean you have to dedicate a lot of time. Automate these tasks.

It's important to have a clear understanding of where and how new data enters your org. You may have data coming into Salesforce from many different sources. Imports, web entries, manual entries, and/or marketing automation systems, to name just a few possibilities.

Ask yourself the following: Where is your data coming in from? How do you intend to use the data and what purpose does it serve to your organization? What type of records do your sources create? Are they Leads? Contacts? Accounts?

Knowing your internal business processes is key to ensuring that the data coming into Salesforce is being entered and utilized in a way that will best suit your individual and team goals.

STRATEGY 2: IMPLEMENT A DATA MAINTENANCE PLAN

TASK 1

- ☐ Prevent dirty data from polluting your org

- Make sure that data coming into Salesforce does not create duplicates. Utilize Salesforce's native dupe blocking functionality or install a [free dupe prevention app](#) to [stop duplicates in real-time](#).
- When importing, it's critical that you don't create duplicates. Ideally, you'll want to upload unique records and update existing records with information from your file.

Although Salesforce has its own import wizard, it fails to effectively consider duplicates. There are many [import tools](#) that better handle duplicates and that offer more robust features for identifying dupes.

TASK 2

- ☐ Enforce data entry standards and procedures

- [Apply validation rules](#) to make data entry easy. For example, create a validation rule that prompts the user of an error if four digits are entered for an Account Number when five digits are required. Picklists can also help keep your data uniform which makes reporting more accurate.
- Review [current validation rules](#) to confirm records are complete and conform to data quality standards.
- [Require fields](#), but not too many. Only require users to input what's critical to the business. Asking them to input too much information will deter them from using Salesforce.

TASK 3

- ☐ Assign responsibility to a data steward

- Appoint someone, or build a team, to [maintain responsibility](#) for your Salesforce environment.
- Hire a [full-time Salesforce admin or consulting firm](#) to manage Salesforce.

GOAL 1: IMPROVE DATA QUALITY

STRATEGY 3

MAKE SALESFORCE A “ONE-STOP SHOP”

The main goal of Salesforce is to help you manage your business relationships. It can serve as your single source-of-truth—a place where all points of the customer journey are documented from start to finish. The more users use Salesforce, the better your data quality will be.

Consolidating all your data into Salesforce, instead of scattering information across multiple sources like a POS system, e-commerce, and an email platform will allow you to have a clear, concise picture of what’s going on within your business.

STRATEGY 3: MAKE SALESFORCE A “ONE-STOP SHOP”

TASK 1

☐ Make Salesforce mandatory

- Have performance reviews include metrics and reports that are pulled from data that lives in Salesforce. Numbers that account for activity and usage should be reflected in performance reviews. “If it’s not in Salesforce, it doesn’t exist.”
- Tie the payroll process to tasks in Salesforce. For example, require that sales reps fully close out an Opportunity before a commission check is issued.

TASK 2

☐ Eliminate siloed data

- Eliminate the need for users to navigate outside of Salesforce. Sync ERP systems, marketing automation platforms, accounting applications, and other business tools with Salesforce.
- Integrate business processes via apps. The Salesforce ecosystem is filled with applications and components that can do this for you. Anything from document generation, lead routing, to timesheets tools can be found on the [AppExchange](#). If all your business data is inside Salesforce, there should be no reason why users would use anything but Salesforce.

TASK 3

☐ Restrict outside workarounds

- To prevent data from being siloed, limit access to software programs and platforms outside of Salesforce. If sales reps are able to generate quotes in Salesforce, don’t give them access to quote generators that live outside of Salesforce.
- Don’t leave out non-sales employees, like receptionists, and front and back office staff. Although typically thought of as a Sales and Marketing tool, employing Salesforce across all departments will foster a cohesive, well-connected environment.

A background image showing a call center environment. In the foreground, a man with a beard and a blue plaid shirt is wearing a headset and smiling while looking at a laptop. In the background, another person is visible, also wearing a headset, but they are out of focus.

GOAL 2 **EMPOWER USERS**

IT DOESN'T TAKE A ROCKET SCIENTIST TO KNOW THAT EMPLOYEES WHO FEEL PERSONALLY INVESTED

in their work are more effective and productive employees. The same idea applies to utilizing tools and systems adopted by an organization to manage its business operations. When your teams feel connected to a system like Salesforce, when they see its value to their work and feel they have a say in how to use the platform, you won't have any issues with user adoption.

Perhaps one of the biggest mistakes an organization can make is to adopt a new system and hand it over to its staff expecting it to work automatically. You've invested a lot financially in a Salesforce system. You need to also invest the time it takes to train your staff and customize the platform to your operational procedures. The big payoff is in the long term.

It is essential to spend time with the major business units who will be using Salesforce to understand their processes and procedures as well

as their business needs. From this analysis, the Salesforce platform can be structured to align with how things already run. Then, staff needs to be trained. And training should be a formal process with timelines and goals. Self-training, or five minutes standing over someone's shoulder, rarely turns into long-term success.

As you develop plans to empower users and give them ownership of their data and its management, keep in mind that continual review and training needs to be a part of the overall approach. Salesforce is a sophisticated platform with a lot of flexibility. Your company is dynamic. Data needs change. Procedures and processes develop and morph.

As these things happen, you'll need to revisit both how your Salesforce implementation is meeting new needs and how your users are using the platform. Older procedures may no longer be necessary or may have become inefficient. But habits can be hard to change. Your approach to empowering users should accommodate these challenges and offer ways to work through them.

GOAL 2: EMPOWER USERS

- STRATEGY 1: TRAIN AND SUPPORT USERS
 - » Task 1 Hold monthly training sessions
 - » Task 2 Set aside two hours per week as open office hours
 - » Task 3 Create a Chatter group
- STRATEGY 2: SHOW USERS WHAT'S IN IT FOR THEM
 - » Task 1 Demonstrate truth in numbers with dashboards and reports
 - » Task 2 Show users how Salesforce increases productivity
 - » Task 3 Depict the customer experience
- STRATEGY 3: GIVE USERS "OWNERSHIP"
 - » Task 1 Understand workflows and needs
 - » Task 2 Get feedback, ask questions
 - » Task 3 Mimic Salesforce to the business

GOAL 2: EMPOWER USERS

STRATEGY 1

TRAIN AND SUPPORT USERS

The most common reason people don't consistently use Salesforce is because they simply don't know how. Oftentimes employees are thrown into the system without any direction.

A great place to start, when it comes to effective training, is to evaluate where users currently stand. How familiar are they with Salesforce? Separate the early adopters from the laggards and cater training to each level of experience.

Come up with three or four features or tasks within Salesforce that users should master, depending on their role. Every week ask each user to rate themselves on a scale of 0 to 10 on how confident they are with each particular feature or task. This will give you an idea of what to focus on and also provides an easy, measurable way to see who's improving in each area and who needs more assistance.

STRATEGY 1: **TRAIN AND SUPPORT USERS**

TASK 1

☐ **Hold monthly training sessions**

- Each month **conduct training sessions** focused on a different topic each time. Keep each session relevant to the users' role.
- Conclude each training session with **three action items** for your users to implement and have them report back with their successes or challenges. This will give them concrete goals that serve as stepping stones to overall adoption.
- Create a **training videos library** by recording each session. This will be a great resource for both new and veteran users who need a refresher, and something session attendees can refer back to.

TASK 2

☐ **Set aside two hours per week as open office hours**

- Foster an **open communication environment**. If you work onsite with your users, designate Thursdays 2pm-4pm, for example, as a time where users can pop into your office and ask any Salesforce related questions they'd like.
- If you work remotely and don't have the ability to have face-to-face interaction with your users, consider using **online screenshare tools** to facilitate an in-person meeting.

TASK 3

☐ **Create a Chatter group**

- Use Chatter to **announce new features or changes** that will impact your users. Chatter keeps users in the Salesforce platform.
- **Store help resources, documents, and video tutorials** in the group. Make this the designated place where these documents will live so that multiple versions don't float around your organization.
- Encourage users to share tips **with one another, post wish list items, and feedback**. Give your users a voice.

GOAL 2: EMPOWER USERS

STRATEGY 2

SHOW USERS WHAT'S IN IT FOR THEM

Sometimes users have preconceived notions that Salesforce is only being used as a way for upper management to monitor and control their actions. Users think they have to enter data solely to please management and that it's just another item to check off their to-do list.

To change the minds of users, they must be presented with the benefits of using Salesforce.

Salesforce is not just for sales and marketing. Ultimately the data in Salesforce supplies the whole company with insights that enable a more compelling customer experience, and facilitates tracking business growth and development.

Learning as much as you can about your customers is a critical aspect of delivering excellent customer experiences. When you have a complete 360-degree view of your customer base, you're able to deliver more relevant and personalized messages to your target market. You can better predict your customers' needs and preferences and lessen the risk of frustrating customers and damaging your organization's reputation.

STRATEGY 2: **SHOW USERS WHAT'S IN IT FOR THEM**

TASK 1

- ☐ **Demonstrate truth in numbers with dashboards and reports**

- First define which **key metrics** are meaningful for each division within the company. What numbers do executives, VPs of Sales, Marketing, Support care about to run their departments? For example, if the VP of Marketing needs to track response rates, trials, or campaign awareness, create reports and dashboards that capture that data at the campaign, campaign member, lead, and opportunity levels.
- For all users, include company-wide metrics to show how their efforts **impact the overall goal**.
- Remind users that metrics will be inaccurate with dirty data, so **inputting correct data is critical**.

TASK 2

- ☐ **Show users how Salesforce increases productivity**

Answer the “**what’s in it for me?**” question by illustrating how the benefits of each piece of data they enter overshadows the time and effort of entering it:

- Data can be **accessed anywhere** at any time.
- Other users can access the data which cuts down on back-and-forth requests for information. In other words, **less emails!**
- **Less time** can be spent updating management on pipeline and deals when all the data is in Salesforce.

TASK 3

- ☐ **Depict the customer experience**

Communicate clearly how Salesforce **enhances the customer experience**:

- Marketing and sales stay **better aligned** and know what each is doing. Sales is able to see what marketing materials are being sent, while marketing can get a better understanding of who customers are.
- Salespeople will have a **clear picture** of every phase of the customer lifecycle, even after the sale. All interactions are documented like customer service inquiries, invoicing, and support cases.
- Users will be better equipped to **anticipate customer expectations** based on data from prior customer interactions.

GOAL 2: EMPOWER USERS

STRATEGY 3

GIVE USERS “OWNERSHIP”

The overall goal of Salesforce is to make life easier for users, yet many businesses fail to actually understand what factors support this goal. Too much time is spent on migration and integration in the beginning of a Salesforce project, and not enough time is dedicated to talking to users about their needs. Eventually, if not right away, the stage is set for disengaged and resentful users.

Instead, let users have a say in how your Salesforce environment works. Of course, every wish cannot be granted. But giving users a chance to voice their wants will give you, the implementor, an idea of how to make an org that users will actually use and will give users a sense of ownership.

STRATEGY 3: **GIVE USERS “OWNERSHIP”**

TASK 1

- ☐ **Understand workflows and needs**

- Consult with departments within your organization.

The best way to get a handle on how various units access and use the data stored in your Salesforce org is to spend some time going through the day-to-day activities of each unit. Seek to understand what they do and how they do it, and how your data resources support those efforts. With this knowledge in hand, you can best ensure that your Salesforce org is structured to align with business needs, particularly in terms of permissions, reporting, and integrations.

TASK 2

- ☐ **Get feedback, ask questions**

- Understand the role data plays within various business units at your organization. Involving users in implementation and feedback will make them feel like they own the system.

TASK 3

- ☐ **Mimic Salesforce to the business**

- Only house data in Salesforce that is relevant and necessary to your company. Don't waste time on migrating information that will never be accessed. It will only take up space and confuse users.
- Collaborate with various departments and stakeholders to determine the problems and needs that Salesforce needs to fill. Prioritize requirements between “must haves” and “nice-to-haves” to guide you on what implementations need to be addressed first.



GOAL 3 INCREASE PRODUCTIVITY AND SUSTAINABILITY

THE MAIN GOAL OF IMPLEMENTING ANY SYSTEM IS TO **SERVE THE NEEDS AND MISSION** OF THE ORGANIZATION.

Systems like Salesforce are, at their core, about productivity and efficiency. It wouldn't make sense to invest the resources, both time and money, in a system that slowed down activity or that made procedures cumbersome, vague, and unproductive.

Salesforce is a repository of one of the key assets of any business, its data, as well as system to manage and utilize that data to meet organizational objectives. It enables collaboration and sharing of information across business units with access from virtually anywhere. These facts alone suggest added productivity and efficiency, but things are never so simple.

If your users do not fully adopt the Salesforce platform, you've added nothing in terms of efficiencies. In fact, you could even be making things worse. It is not unusual to see an organization that has not done

a good job of rolling out Salesforce where teams maintain their pre-Salesforce processes and only begrudgingly use Salesforce “for show.” In essence, those teams have just doubled the work it takes to make their business happen.

But with careful planning, these problems can be avoided and your investment in Salesforce can enhance your business. Users need to be held accountable, but management also needs buy-in. Goals need to be set, communicated, assessed, and then reassessed. However, this should never be a top-down approach. Communicate with all stakeholders and work with them to customize and automate their data needs within the Salesforce platform.

GOAL 3: INCREASE PRODUCTIVITY AND SUSTAINABILITY

- **STRATEGY 1: HOLD USERS ACCOUNTABLE**
 - » Task 1 Get buy-in from upper management
 - » Task 2 Set measurable goals
 - » Task 3 Capitalize on sales’ competitive instincts
- **STRATEGY 2: REASSESS**
 - » Task 1 Perform periodic audits
 - » Task 2 Communicate
 - » Task 3 Get entrenched in the Salesforce Ohana
- **STRATEGY 3: CUSTOMIZE SALESFORCE**
 - » Task 1 Customize the user experience
 - » Task 2 Give correct access and permissions
 - » Task 3 Automate

GOAL 3: INCREASE PRODUCTIVITY AND SUSTAINABILITY

STRATEGY 1

HOLD USERS ACCOUNTABLE

It's not enough to just make Salesforce a requirement. It's also necessary to create a strong culture of accountability where users believe that their efforts will impact the overall goals of the company.

When there's a lack of accountability, users get the impression that it doesn't matter whether they adopt Salesforce or not. This is especially true if upper management fails to set an example for employees.

Setting goals and measuring results is the best way to hold users accountable. Inform users that their efforts will be measured, how they'll be analyzed, and the repercussions of not following policies.

STRATEGY 1: **HOLD USERS ACCOUNTABLE**

TASK 1

- ☐ **Get buy-in from upper management**

- Build an **Executive Sponsorship team**. Recruit one or more persons in upper management positions to be champions and enforcers of the Salesforce platform. Their vested interest in increasing user adoption will help influence subordinates to use Salesforce so that everyone can meet the goals of the company.
- Give management the **data they need to make better decisions**. Show them how valuable Salesforce can be giving them access to reports that are of interest to them, like forecasting, pipeline, and top accounts. This will help them understand the importance of user adoption and the motto, "If it's not in Salesforce, it doesn't exist".

TASK 2

- ☐ **Set measurable goals**

Look at these three areas to measure user adoption:

1. **Usage** – Are users not only logging into Salesforce, but are they actually creating and updating records? Examine how many records have been created within a certain time period and the number of completed activities.
2. **Data quality** – Are users entering data correctly and completely? Make sure important fields are being properly filled out and pay close attention to duplicate records.
3. **Business performance** – Make sure there's purpose to what users are inputting. You don't want data in Salesforce just for the sake of having data. Data needs to provide meaning to your organization.

TASK 3

- ☐ **Capitalize on sales' competitive instincts**

- **Hold contests** to see who logs the most calls in Salesforce each week.
- Every month **buy lunch** for the user who closes the most Opportunities.
- There are many **gamification apps** on the Salesforce AppExchange that include leader boards, contests, and other incentive programs.

GOAL 3: INCREASE PRODUCTIVITY AND SUSTAINABILITY

STRATEGY 2 **REASSESS**

Like your car, Salesforce requires regular maintenance to keep it running smoothly and efficiently. It's not enough to create validation rules in the beginning or clean the data one time only. As your business changes, so does your data. This is why it's important to dedicate time once a quarter, or whatever interval you feel is necessary, to reevaluate your org.

It's also important to regularly meet with key stakeholders to determine what new Salesforce challenges may have developed since your last consultation.

And, as your company's data steward, taking time to review any new changes with Salesforce will make your environment even more relevant and state-of-the-art. With all the available resources, events, and communities, the Salesforce ecosystem can be fastmoving and overwhelming. Luckily there are a few simple steps you can take to keep up with the platform.

STRATEGY 2: **REASSESS**

TASK 1

☐ **Perform periodic audits**

Reevaluate fields:

- How many fields have been created and are actually being used? Can fields that are blank 90% of the time be eliminated?
- Are all fields correctly mapped between objects?
- Can unused or duplicated fields be consolidated or eliminated?

Ensure data quality is up to par:

- How many duplicate records are present?
- Are procedures or applications in place to prevent duplicates from entering Salesforce?
- Does incoming data conform to validation rules to ensure records are complete and meet data quality standards?

Check users and permissions:

- Do current permission profiles meet business needs or are new profiles needed?
- Are there any users who are no longer employed? Have their user IDs been deactivated and records reassigned?
- How many user licenses are available, and are there any licenses that can be deactivated to limit unnecessary spending?

More audit tips →

INSANELY USEFUL DIY Tips to Keeping an Impressive **SALESFORCE® ORG**

A Salesforce® Admin's must-have guide complete with best practices, step-by-step how-tos, protips, worksheets, and a free data health check.

EBOOK

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STRATEGY 2: REASSESS (CONT.)

TASK 2

Communicate

- It's simple: **keep the lines of communication open.** Encourage feedback from users, and most importantly, listen to their needs.
- Make an effort to regularly visit with department heads and key stakeholders. Ask them if Salesforce is still meeting their needs and what their biggest problems are. **Leverage their feedback** to test and continue to improve the system.

TASK 3

☐ Get entrenched in the Salesforce Ohana

- Three times a year Salesforce comes out with a **major release** filled with new features. Be sure to read up on the release notes.
- Periodically visit the **Salesforce AppExchange**. The AppExchange is filled with over 4,000 applications that can be installed directly to your org to enhance your business.
- Obtain a **Salesforce certification** or earn badges through self-guided tutorials on Trailhead.
- Attend one or two **Salesforce events** like Dreamforce or a world tour.
- Join a **local user group** to network and collaborate with other Salesforce users in your area.
- Stay **socially connected** by joining the Salesforce Success Community. You can also find valuable information or help on Twitter. Next time you're stuck, tweet your problem using #askforce and a Salesforce superuser is bound to help you.

GOAL 3: INCREASE PRODUCTIVITY AND SUSTAINABILITY

STRATEGY 3

CUSTOMIZE SALESFORCE

Salespeople spend just 34 percent of their time actually selling. The rest of their time is spent handling administrative tasks like updating records, recording activity and tasks, and obtaining approvals. That's where Salesforce customizations can reduce the amount of "house-keeping" tasks so sales reps can focus on selling.

One of the most appealing aspects of Salesforce is the fact that, while it can be implemented out-of-the-box, the real power is seen with customizations. Whether it's through visual customizations or automations, you can essentially mold your Salesforce environment to complement your business practices however you need.

STRATEGY 3: CUSTOMIZE SALESFORCE

TASK 1

☐ Customize the user experience

- Keep **page layouts clean, simple, and consistent** across all objects. Combine, consolidate, and eliminate fields that are not used or are duplicated.
- Customize page layouts for each department using **page layout assignments**. This will allow each division access to only the data that is relevant to their role.
- **Order fields** according to how users input and access information with more frequently used fields towards the top and less important fields at the bottom of the page.
- Use **simple, common sense labels** for field names. If you feel users may question the purpose of a field or what type of data should be entered, use help text hover options. This is especially helpful for custom fields.
- Don't neglect **list views and search layouts**. Customize these to display info that is relevant for users. If users have the info they need at a glance, the less clicking they will need to do.

TASK 2

☐ Give correct access and permissions

- Analyze new and current users to ensure each is **properly configured** with a profile and permissions that are appropriate to the individual role in the organization.
- Only give users access to Salesforce **pages and functions that they need**. Doing so will foster a cleaner, simpler user experience and a more relevant org that is easier to adopt.
- When **new users** join your team, and as you assign profiles and roles, take into consideration their level of expertise, their level of clearance, which objects they will be working with, and what their overall role in Salesforce will be.

STRATEGY 3: CUSTOMIZE SALESFORCE (CONT.)

- Don't neglect **field-level security**. There may be fields that contain confidential information, like social security numbers or medical history notes. Most likely not all users need to access this information. This is where field-level considerations need to be made.

Keep in mind that field-level security is separate from removing a field from a page layout. If a user has "Read" access to the field, they may not be able to see or edit the field on the actual record, but they will still be able to access the data by generating a report.

TASK 3



Automate

- Create **workflows** that reflect internal business practices. Make Salesforce work for your business processes, instead of forcing business processes to work with Salesforce.

For example, setup a workflow that will automatically send an email reminder to the renewal manager 20 days before a contract expires. Or prevent leads from slipping through the cracks by automatically notifying the sales manager if a lead is not assigned within two days.

- Visit the AppExchange for applications that make **users' workloads easier**. Anything from document generation apps, electronic signature modules, data cleansing tools, to marketing automation platforms can automatically eliminate the manual work required from users.

THE 3X3 APPROACH TO USER ADOPTION VIA DATA QUALITY

In this ebook, we have focused on data quality as a key aspect of user adoption of the Salesforce platform.

If your users aren't using Salesforce effectively, or aren't using it at all, you're spending a lot of financial resources with no return on your investment. And in fact, you may have made your business units less effective and less productive than before adopting Salesforce.

We take the approach that high levels of data quality—accurate, complete, clean data that is structured in ways that align with business needs and practices and that make it easy to access and utilize the data—both encourages and facilitates user adoption.

If the data is good, easy to find, easy to work with, and if the platform has been designed to be easy to use, your staff will naturally and comfortably take up Salesforce as an important business tool. No one wants to work with a bunch of garbage that makes their day harder.

Adopting and rolling out Salesforce can be a daunting task. In fact, it can be even more difficult to improve adoption and use in an organization that has had the platform for some time but not used it effectively.

The 3X3 approach described here is designed to make the complicated goal of user adoption manageable by breaking it down into clearly defined tasks that can be executed and then measured fairly quickly and easily.

Once you've worked through all three goals and all nine strategies, you should be well on your way to a smooth running Salesforce implementation that all of your stakeholders and business units turn to with confidence and success.

BONUS! DOWNLOADABLE CHECKLIST

We put all the goals, strategies, and tasks you've just read about into a free Google Sheet so you can track your progress.

GRAB A COPY

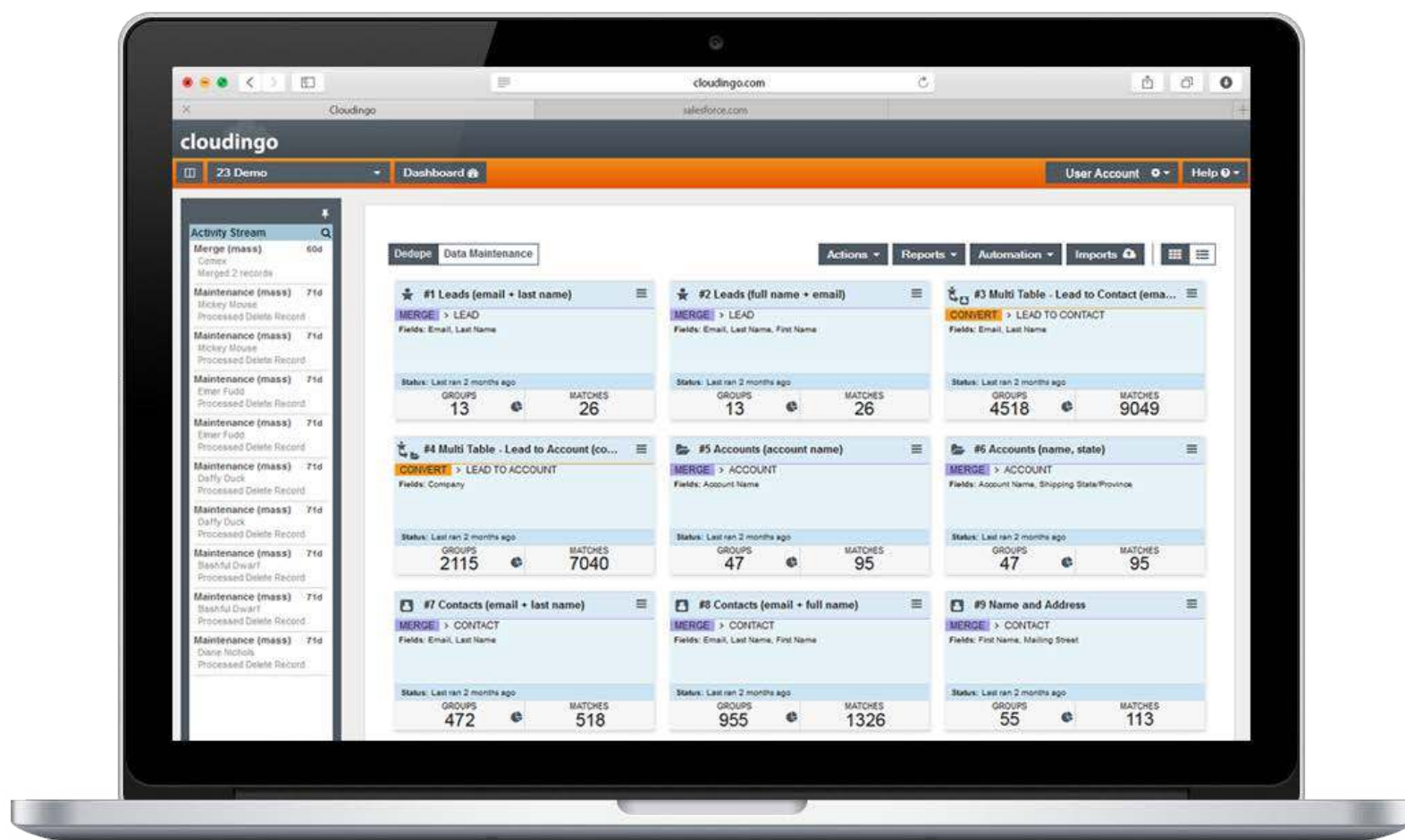
Goal 1: Improve Data Quality			
Strategy 1: Clean existing data	Task 1: Eliminate duplicates that are already in Salesforce		X
	Task 2: Get rid of old data that has turned stale		✓
	Task 3: Standardize, update, and enrich data		X
Strategy 2: Implement a data maintenance plan	Task 1: Prevent dirty data from polluting your org		X
	Task 2: Enforce data entry standards and procedures		✓
	Task 3: Assign responsibility to a data steward		✓
	Task 1: Make Salesforce mandatory		✓



GET RID OF DIRTY RECORDS AND HAVE SALESFORCE DATA YOU CAN TRUST

Eliminate duplicates, clean records, and maintain data quality all in one place.

START FREE TRIAL



"In only a few hours we were able to clean up nearly 20,000 records!" -Annie C., e-Spirit



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