Ultimate Guide to Successful Salesforce Implementation

Introduction.

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Salesforce is the world's most popular enterprise customer relationship management platform. With its broad and diverse range of solutions, Salesforce helps improve operational efficiency and business expansion, whether you are a small company or a large corporation.

Despite Salesforce's power and versatility, many have reported that they cannot make full use of its functionalities, or that it has not boosted their companies' efficiency as much as they have hoped.

This eBook is a guidebook to help you avoid Salesforce implementation failures. It covers the most common issues you need to know about, the key to success, and the steps to take to implement Salesforce. In many cases, it is advisable to get implementation support, so consider implementation and development support as well.

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Common Challenges for Salesforce Implementers

Salesforce is a highly functional service that can be used for everything from customer management to marketing, sales support to customer service.

On the other hand, introducing the system will not solve everything. Here are some of the challenges you may face after implementation.

Migration from existing systems is not progressing.

Specialized customization may be required for data formats used in existing systems or for integration with other systems.

Failure of field staff using the tool to understand it.

The system migration must be accompanied by sufficient training and trial periods to ensure proficiency in the use of Salesforce.

Can't get around to entering data.

If you have not used SFA or CRM in the past, your staff may not be accustomed to the additional work of data entry.

It takes time to see the effect of introduction.

Accurate analysis requires accumulation of data. It does not necessarily mean that the effect or productivity will increase immediately after the introduction of the system.

Poor coordination between departments.

Although cross-departmental information management essentially ensures efficient collaboration, differences in perception and understanding among departments can create fragmentation.

Operational flow is not defined.

Even if there is a vague objective, if the specific operational flow is not defined, the system cannot be utilized at all.

Lack of data analysis and problem solving.

Data that is stored, shared, and managed makes sense when it is analyzed. It is important to analyze data from time to time to solve problems.

Unfamiliarity with operability and lack of penetration of use.

It is possible that there was insufficient planning before implementation in situations when the interface and operations are new. As quickly as feasible, training needs to be offered.

Clarify the purpose of introduction

Because Salesforce is so highly functional, it can be used in a wide variety of ways and customized in many ways. The purpose of implementing Salesforce must be clear, and if the usage and desired value are unclear, it will not be utilized effectively.

Why do you want to implement Salesforce?

What problems do you hope to resolve with Salesforce?
You must select the best product from the Salesforce product suite based on your goals. The implementation and use of Salesforce may be hampered by unnecessary capabilities that are inconvenient or difficult to utilize.

For example:

- Want to refine traditional customer management methods
- I want to use customer information for marketing and sales
- Save data and response process for each client
- I want to perform more sophisticated customer analysis
- I want to use it for project management
- Systematize personnel evaluation with progress and achievement rate management

Salesforce Key Tools

Sales Cloud

- A variety of features to optimize customer interaction and enhance customer service
- Management of customer information to improve efficiency and closing rates

Advantages
- Greater comprehension of customers because it can be connected to SNS data
- Capable of recording all information related to sales activities
- Follow-up can be done

Service Cloud

- Streamline customer support for your clients
- Helping to achieve high quality customer support

Advantages
- Provide information to improve customer satisfaction
- Response history can be shared

Marketing Cloud

- Manage customer information and streamline customer outreach through email and messaging

Advantages
- Numerous content can be easily created
- Visualization of the customer's reaction to the approach
- Linkage function with SNS is available

Lightning Platform

- No-code tools can be used to build applications and further utilize CRM

Advantages
- More intuitive to use than Salesforce's Classic interface
- Ability to share information on dashboards and request improvements with data analysis functions

Establish an operational structure

Establishing the purpose of use will help to clearly communicate this information to the staff who will actually use the tool.

Also think about preparing training or instruction on how to use the system.

Before Installation
There are many things you can do

● Sharing the purpose of introduction, on-site interviews

The purpose of the introduction is shared with the staff who will use the system in the field. After gaining a common understanding of the objectives, we interview the staff about the needs of the site.

● Manual Preparation

User manuals available within the company are used according to the way they are operated and utilized within the company.

● Establishment of internal support

Build support for field users with implementation support companies, internally or with Salesforce.

● Conducting training

Pre-installation training is called onboarding. Onboarding is a costly and time-consuming process.

Training/Onboarding
Implement

● Purpose of Onboarding

Onboarding is not only to learn how to use the tool or to verify that it is consistent with your objectives. Of course, the primary goal is to reduce stress during implementation, but it is important to anticipate improvements in manuals and support systems in advance.

● Validate and utilize onboarding results

After conducting onboarding, identify disincentives and implementation stress in the field, and provide feedback to the manuals and support system to develop a more user-demand-oriented support system during actual implementation.

● Using an implementation support company is also an option.

Implementing an onboarding program with internal resources alone requires considerable preparation. Consider hiring an implementation support company.

Start small at the beginning

When introducing a new system, it is preferable to start small rather than to suddenly and drastically change the existing workflow and systems. Verify the effectiveness and response to the introduction of the system, and build on the successes.

Small Start Has Advantages

Even if the implementation's goal is to have a medium-to-large-scale impact on business, starting small is still the best course of action. Obviously, this is a risk mitigation strategy in case the introduction is unsuccessful, but that may not be the only one!

Many concepts require actual application in order to fully comprehend them. After the system is introduced and put into use on-site, we will assess its effectiveness based on our experience, internal needs, and outcomes. The number of departments and tools used should be gradually increased.

The introduction of a new tool, function, or system places a heavy burden not only on the user side, but also on the implementation and support side. By narrowing the scope of the implementation objectives, it will be possible to accurately and carefully conduct interviews to ensure good support, cost management, achievement of KPIs, and PDCA. Additionally, it's critical to build up the company's best practices in order to create a strong argument for future expansion.

Start small to learn customer management systems

The benefits of a small start are as noted above, and regardless of the size of the company, a small start is a safe and courteous approach to implementation.

For companies that are new to or inexperienced with customer management systems or full-scale sales support tools, it is often difficult to predict the implementation of such systems, so starting small is a must as a risk hedge.

Specifically, it is best to start with a departmental unit or a team responsible for a specific task within a department. Expansion can be done at any time after implementation. You may not be able to resume the previous flow if you implement a multi-departmental collaboration or a company-wide reform all at once, and you'll have to invest a significant amount of resources in handling dysfunctional cases. By leaving out features from the expanded system, it is also difficult to go back to the old one.

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In general, Salesforce is not frequently used in its current form.

It should be customized according to the purpose of implementation, internal situation, needs, and scale.

Customize and Optimize

- **Flexible customization**

  Salesforce supports a wide range of flexible customization. Customize it to suit your company by combining and linking groups of tools and integrating with other services.

- **Customization is Salesforce's strength.**

  Salesforce is designed to be a tool that can be used widely across industries, business types, and company sizes. Its functions support a wide range of purposes, from customer management, sales management, sales support, marketing automation, and project management.

  As a result, it is extremely sophisticated and, without customization, may be difficult to use due to its many functions. It is recommended that you start with an appropriate configuration, selecting the functions you need.
  Conversely, of course, by customizing the system appropriately for the scale and purpose of introduction, it can be made very easy to use and the hurdles to introduction can be lowered.

Implementation Support Leverage Partners

- **Customization requires specialized expertise.**

  While it supports highly functional and flexible customization, its customization and system development require specialized knowledge and skills. Although users can customize it themselves, in order to properly customize it according to their needs, it is desirable to ask a partner who provides introduction support. Customization requires not only technical knowledge, but also what kind of functions are necessary to achieve the purpose of the company, and it is also important to assemble the specifications. Experienced partners have an advantage and will have good ROI in the medium to long term. It is also a great advantage to receive support after installation.

- **Advantages of Offshore Development**

  Among implementation support partners, those that support not only domestic development but also offshore development are often more technologically advanced and cost-effective, and should be actively considered.

Salesforce Implementation Flow

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This section summarizes the specific Salesforce implementation process.

In practice, the optimal flow is designed for each project, but the basic flow is shown in the figure below.

We conduct interviews with the customer to find out their requirements and internal circumstances, resolve current issues, and prepare a requirement definition.

We determine the specifications for Salesforce customization and application or system development to meet the client's needs, and design the system based on the specifications.

We provide ongoing support for operations in your environment and perform maintenance as needed. We may make improvements in response to feedback.

Identify tasks, plan and execute development, and document procedures according to specifications.

We will provide the customer with documentation, check the operation, and perform the system switchover in the production environment.

The system is verified through testing in the following order: unit testing, coupling testing, system testing, and operational testing.

1. Requirements Definition

2. Designs

6. Operation & Maintenance

salesforce

3. Development

5. Delivery of Goods

4. Verification

Salesforce Implementation and Development Support at Rikkeisoft

As a Salesforce consulting partner, Rikkeisoft provides high quality services with highly qualified engineers.

Services Offered Sales Service Cloud Implementation Support Services Development Cooperation Support Utilization and Retention Support

Focus Industries Banks Insurance Retail Advanced Education Construction Medical Care

Highly Qualified Personnel

We have many skilled engineers in many cloud areas of Salesforce

- Rikkeisoft has highly skilled engineers working in many cloud areas
- Rikkeisoft have worked with large Japanese companies for a long time
- Experienced in small and large projects, participating in software design and other phrases
- Rikkei has extensive Salesforce Cloud experience

Quality and Cost Competitiveness

- We can adopt new technologies and respond to the market

Salesforce Case Studies at Rikkeisoft

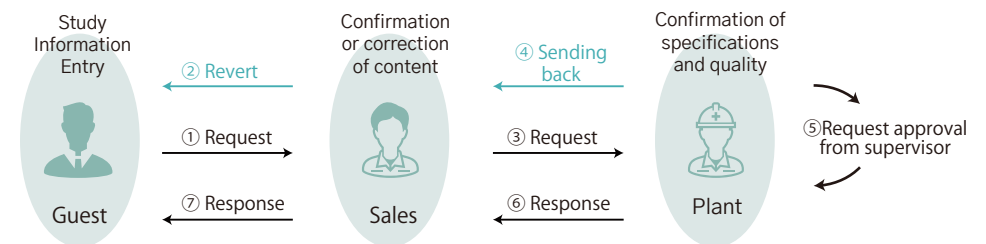## CASE 01   Examination of equipment specifications

Project Summary

- Customer Information Management
- Quality Management
- Specification Management
- Review Result Management
- Reports & Dashboards

Current System Issues

- Before systemization, all workflow is communicated via paper forms, telephone, e-mail, and fax.

Business flow of existing system

Study Information Entry — Guest

② Revert
① Request
⑦ Response

Confirmation or correction of content — Sales

④ Sending back
③ Request
⑥ Response

Confirmation of specifications and quality — Plant

⑤ Request approval from supervisor

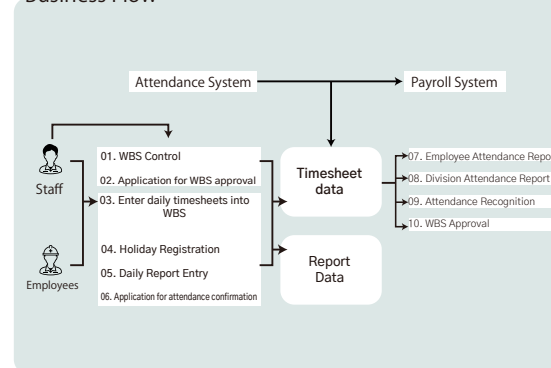## CASE 02   Back-office Operation Efficiency System

Project Summary

- Daily performance management
- Daily Report Management
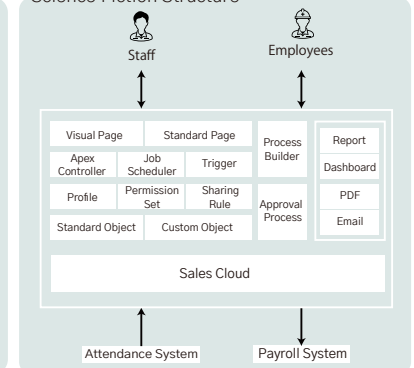- WBS Management
- Reports & Dashboards

Current System Issues

- Maintenance is difficult because the system is configured with various programming languages
- Environment dependent and only available on PC
- The system was configured on-premise and cannot be used without coming to work
- No permission management, so data that should not be visible is visible

Solution "Sales Cloud"

Business Flow

Attendance System → Payroll System

Staff
- 01. WBS Control
- 02. Application for WBS approval
- 03. Enter daily timesheets into WBS

Employees
- 04. Holiday Registration
- 05. Daily Report Entry
- 06. Application for attendance confirmation

Timesheet data

Report Data

- 07. Employee Attendance Report
- 08. Division Attendance Report
- 09. Attendance Recognition
- 10. WBS Approval

Science Fiction Structure

Staff   Employees

Visual Page	Standard Page	Process Builder	Report
Apex Controller	Job Scheduler	Trigger	Dashboard
Profile	Permission Set	Sharing Rule	Approval Process	PDF
Standard Object	Custom Object		Email

Sales Cloud

Attendance System   Payroll System

Offshore Development Process Introduction

Guest — **Rikkeisoft**

Sprint Plan

Requirement → *Request for points* → • Requests Content • Design Document

Defect List → *Request for points* → Defects Response Request

Planning and Coordination

Confirmation of request contents
Task Sharing
Task Estimates
Regular Meetings

Sprint Implementation

Discussion tickets in Redmine or other management tools

Coding → Unit Tests → Integration Test

Daily Reporting
Meeting Minutes
Report

End of sprint

Release Packages ← *Delivery* ← Approval ← UAT ← *Release* ← Product demonstration for your company

Feedbacks →

Review Meeting Held

*Actual process and division of responsibilities will be decided upon consultation.

If you want to implement Salesforce Contact Rikkeisoft for its wealth of experience.

Rikkeisoft is a Salesforce consulting partner company

From Salesforce implementation to development and support, we have an experienced team and a system in place to assist you with your needs.

Contact us

Rikkei Corporation
https://rikkeisoft.com