

The Power of a Readiness Checklist

Ensuring Success with a Comprehensive Preparation Guide

Salesforce Checklist

A Salesforce readiness checklist helps ensure your team, data, and processes are fully prepared for a successful implementation. Below is a flexible template that can be tailored to your organization's specific goals and needs.

Define the Why

- Align on clear business outcomes—not just system goals
- Identify measurable success metrics (efficiency, speed, visibility)
- Prioritize what matters most for Phase 1

Align the Right People

- Establish executive sponsorship and accountability
- Identify cross-functional stakeholders early
- Assign internal champions to drive adoption
- Define how decisions will be made and communicated

Understand What's Not Working

- Document current tools, processes, and workarounds
- Identify bottlenecks, inefficiencies, and delays
- Evaluate data quality and reporting gaps
- Capture what teams actually need vs. what exists today

Design the Future State

- Define streamlined, standardized processes
- Align on how teams will work together in Salesforce
- Establish clear ownership and handoffs
- Identify where automation will drive the most value

Get Your Data Ready

- Identify and prioritize data to migrate

- Clean, deduplicate, and standardize records
- Define required fields and data structure
- Establish governance to maintain data quality

Plan for the Full Ecosystem

- Identify key integrations (finance, documents, external tools)
- Define security and access needs
- Align on reporting and analytics requirements
- Ensure compliance and audit considerations are addressed

Build with Purpose

- Focus Phase 1 on high-impact use cases
- Prioritize quick wins alongside long-term scalability
- Define testing strategy with real business scenarios
- Establish clear go-live success criteria

Drive Adoption from Day One

- Develop role-based training plans
- Communicate the “why” behind the change
- Set expectations for new ways of working
- Provide ongoing support and resources

Optimize & Scale

- Monitor adoption and usage metrics
- Track performance against business goals
- Gather feedback and iterate quickly
- Plan future phases based on evolving needs

This checklist serves as a foundational guide to ensure readiness and can be expanded with additional sections or specific tasks tailored to your particular needs. Adjust and adapt it as necessary to fit the context of your project or event.