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Salesforce.com Secrets of Success: Planning Ahead

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This chapter is intended for executives, decision makers, business analysts, and project leaders who need to make decisions, set expectations properly, and budget the time, money, and people for an SFDC project. Readers will learn how to make planning decisions that give them the best chance of success and the quickest possible failure recovery.

"Intangible results" is just another way of saying "poor planning."

—Anonymous

This chapter is from the book



Salesforce.com Secrets of Success: Best Practices for Growth and Profitability

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Getting to Business Value

A truly effective Salesforce.com (SFDC) system can dramatically improve your business results in terms of customer satisfaction, executive decision making, smooth partner/channel interactions, and, of course, sales. But the benefits of increased visibility, streamlined operations, and faster cash-to-cash cycles are anything but automatic. The whole reason for this book is to guide you through a series of choices and actions to get you the best results with the least amount of cost, delay, and risk.

One of the key success factors in any sales force automation and customer relationship management (SFA/CRM) project is strong executive sponsorship that propels the implementation team and the end users. You'll want to check out Chapter 6 to learn about the best sponsors for your company's situation—but here we'll assume that you already have an executive with fire in his or her belly.

Peter Drucker wrote that the most important part of solving a business problem is a well-formed question. The same is true here: the best way to achieve results quickly is to clearly articulate and prioritize goals. This chapter focuses on understanding the requirements, schedules, and costs that are involved in completing any SFDC project successfully. You'll want to make sure the entire team understands the business drivers and the tradeoffs that will shape your SFDC implementation, its integration with surrounding systems, and the instantiation of business processes that will streamline the way your business runs.

Read the Map Before You Start the Journey

Salesforce provides a large number of helpful roadmaps, white papers, guidelines, and tips for implementation projects. This book builds on those basics, so you'll definitely want to access the Help & Training system inside SFDC itself, and read up on the materials in Salesforce's main Web site (<http://blogs.salesforce.com/guides>), Successforce (<http://success.salesforce.com>), its community site (www.salesforce.com/community), and user-group sites. Check out www.SFDC-secrets.com for even more resources.

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