

Longshore Consulting Salesforce Social Sector Success Checklist

What you need to do to decrease distraction and boost Salesforce adoption at your organization!

- ☐ Communicate early and often with everyone at your organization: what are you doing, why are you doing it, when will it happen, how can they get involved, and where can they go for support.
- ☐ Decide on key processes: Is it everyone's job to update contacts? Should every email, phone call, and meeting with a contact be recorded in Activity History? How should contacts, organizations, donations, etc. be named and labeled?
- ☐ Train users at your organization, not just when you go live! Use Salesforce Trailhead and other free, interactive tools.
- ☐ Turn OFF annoying Chatter feed notifications so staff don't get distracted.
- ☐ Clean your data regularly - I recommend once a quarter using CRMFusion's DemandTools, which is free for nonprofits.
- ☐ Ask for help. The Power of Us Hub, Salesforce Collaboration Community, and #askforce on Twitter are all great resources.
- ☐ Turn ON field history tracking on every object for the 20 fields you use most.
- ☐ Turn ON and download your weekly data export.
- ☐ Turn OFF the ad banner pop up at the top of every page (currently advertising Salesforce1 mobile).
- ☐ Stay in touch with Longshore Consulting and tell your friends to sign up at <http://www.longshoreconsulting.com/> for more great tips and learning opportunities!