



Salesforce

Implementation Checklist



TABLE OF CONTENTS

01 Pre-planning the Implementation

02 Consulting Process

03 Training

04 Pilot

05 Go Live

06 Maintenance

01

Pre-planning the Implementation



Expectation analysis with client.
Business objectives to be achieved.



Gap Analysis and the relevant development.



Resource Allocation - manpower, time, place, and
machinery (applicable to vendor and customer, both)



Setting the timeline of delivery.

02

Consulting Process



Showcase the complete software in
scheduled timeline.



Update the Management and expected stakeholders
on the broader aspects of the software and what to
expect from it.



Setting up the training plan.



Setting up the resources for each training module.



Understand the volume of legacy data.



Discuss with relevant stakeholders to understand the quality and quantity of data to be migrated to new system.



Define the data migration process.



Define formats for data migration process.



Identify roles, responsibilities and workflow plan.



Identify a coordinator who will oversee the project from the client side and one from the delivery Side.



Setup the steering committee meeting plan.



Identify the pilot project or process.



Provide outlook on Train the Trainer Concept.



Identify key resources for each training.



Key output parameters must be identified:

- a) Reports
- b) Templates
- c) Dashboards
- d) Integrations with other systems
- e) Success Parameters in each module.



Identify Go-Live Scenario.

03

Training



Train the users on each module of the Salesforce system.



Ensure that every training session is accompanied by a practice session.



Encourage users to enter the data manually along with Data Loader option.



Follow a practical approach to enter data in the system.



Have users provide confirmation on achieving success parameters defined for the module.



Get sign-off from users on module training.



Conduct a steering committee meeting after completion of each module.

☐ Repeat the process for all the modules.

☐ Maintain a specified timeline.

04 Pilot

☐ Identify a Pilot Project on completion of the training.

☐ Entry to this Pilot Project will start from scratch and the data will be compared with the current system which must be running in Parallel.

☐ The entry includes legacy data as well as the current day to day data.

☐ The comparison of the data will be in terms of presentation in reports or daybook matching all the transactions.

☐ Make sure the Pilot Project is at par with the current system.

☐ Verify each parameter.




☐ Take the sign off achieving the Pilot Project.

- ☐ Conduct and steering committee meeting for the completion of Pilot Project.
- ☐ Identify the strategy to enter the data related to the Other Projects.
- ☐ In case Go Live was Pilot Project completion, declare it Go Live.
- ☐ Or make sure data related to other projects is also entered into the system.

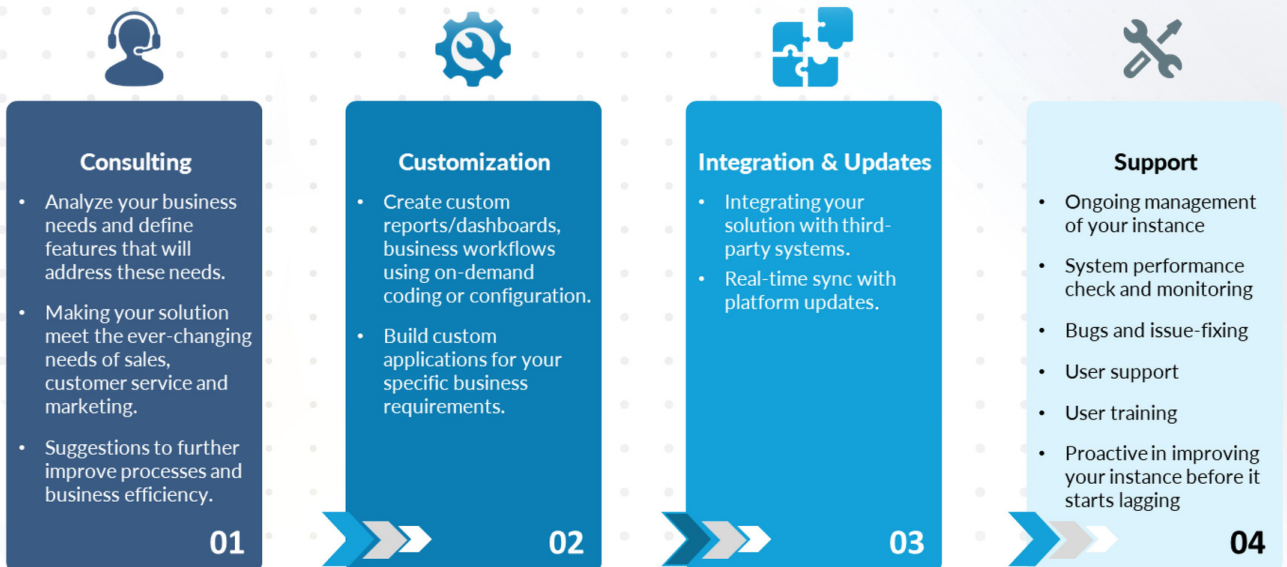
05 Go Live

- ☐ The current system must stop totally.
- ☐ All the workflows, roles, profiles, responsibilities in the new system must be in place.
- ☐ All the new data must be entered into Certinia (FinancialForce).
- ☐ Daily reports matching for couple of weeks must be done to identify any gaps if any.
- ☐ Conduct an exit steering meeting and complete the handover process to the coordinator.

06 Maintenance

-  Setup a maintenance team to investigate the regular or unprecedented issues from the client side.
-  Keep monitoring the data and its quality.
-  Flag off in case something is not looking right or not displaying the work properly.

Managed Services Process





AblyPro is a registered Salesforce® partner and leading implementation & managed service provider. We help you convert your business processes and requirements into a reliable, sensible, and usable Service Cloud, Field Service. Our consultants have extensive experience in Certinia and Salesforce for businesses in a variety of industries.

Schedule a 1:1 meeting with our Salesforce Field Service

ADOPT

Adopt a single point of contact for all your Salesforce needs to save time strain when interacting with multiple team members.

AUGMENT

Augment expert staff to do regular data health checks on the system, use out-of-the-box functionality to resolve issues, and require a minimum number of customizations.

ACTIVATE

Our dedicated team activates and utilizes hours as per your Salesforce and Consulting needs.

ADVANCE

Advance information security with ISO 27001:2013 certified organization that follows all the best practices for information security to protect your data.

ACCELERATE

Accelerate the process with trained Salesforce Analysts who can understand business terms and can have discovery sessions directly with the finance and accounting users.

5 A'S APPROACH



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