

Salesforce Implementation Checklist

40 things to settle before go-live. Work through it with your admin, your executive sponsor, and your implementation partner. Tick each box as it is settled; anything left open is a risk to name early.

1. Goals and scope

- ☐ 1. Write down the top 3 business outcomes (not features)
- ☐ 2. Name an executive sponsor and a day-to-day owner
- ☐ 3. Agree what is out of scope for phase 1
- ☐ 4. Define success metrics and how you will measure them
- ☐ 5. Agree the budget range and the change-control process

2. Data

- ☐ 6. Inventory data sources (spreadsheets, old CRM, ERP, marketing tool)
- ☐ 7. Decide what to migrate and what to archive
- ☐ 8. Clean duplicates before migration, not after
- ☐ 9. Map every source field to a Salesforce field
- ☐ 10. Define a unique key for each object to prevent duplicates
- ☐ 11. Run at least one full test migration and compare record counts
- ☐ 12. Plan a rollback if the cutover fails

3. Process and design

- ☐ 13. Document the current sales, service, and handoff processes
- ☐ 14. Agree definitions for lead, account, contact, and opportunity
- ☐ 15. Design page layouts per role, not one layout for everyone
- ☐ 16. Pick stages and required fields that sales will actually fill in
- ☐ 17. Decide where Flow, validation rules, or Apex fit (declarative first)

4. Security and access

- ☐ 18. Define roles, profiles, and permission sets
- ☐ 19. Set sharing rules and field-level security
- ☐ 20. Turn on multi-factor authentication
- ☐ 21. Plan sandbox access and who can deploy

5. Integrations

- ☐ 22. List every system that must connect (ERP, email, marketing, billing)
- ☐ 23. Choose native connector, middleware, or API for each
- ☐ 24. Decide sync direction and who owns each field
- ☐ 25. Plan error alerts for failed syncs

6. Testing and training

- ☐ 26. Write test cases from real user stories
- ☐ 27. Run user acceptance testing with actual end users
- ☐ 28. Test reports and dashboards against known numbers
- ☐ 29. Train by role, with short recorded sessions
- ☐ 30. Create a one-page quick-start guide per team

7. Go-live and after

- ☐ 31. Set a cutover date that avoids quarter-end
- ☐ 32. Freeze changes in the old system during cutover
- ☐ 33. Assign a hypercare owner for the first 30 days
- ☐ 34. Set up an issue log and a weekly triage
- ☐ 35. Check adoption (logins, records created) weekly
- ☐ 36. Review data quality at 30, 60, and 90 days
- ☐ 37. Plan a release calendar for future changes
- ☐ 38. Schedule a post-launch retrospective
- ☐ 39. Document admin runbooks (backups, user onboarding and offboarding)
- ☐ 40. Revisit the roadmap at 90 days