

10 Common Salesforce.com® Mistakes—and How to Avoid Them

Are you making the most of your CRM?



Implementation

- 1 Overcomplicated set up**—Use the KISS principle: Start simple, build a strong foundation, and expand from there. Too much, too fast is overwhelming and inhibits adoption.
- 2 Poorly defined lead management**—Map your process on paper first: Understand your targets, segmentation, and personas. Define leads. Define opportunities. Document the triggers and conversion process.
- 3 Sloppy data import**—Data is the lifeblood of the system: Scrub, de-dupe, and tag your data. Map fields, then check and recheck to ensure it is correct.



Adoption

- 4 Lack of executive buy in**—The speed of the leader determines the pace of the pack: An executive team that understands the vision and the value of the system outputs can and will lead by example.
- 5 Siloed vision**—Share the end goal—with the entire organization: The more your team members understand the WHY, the more likely they are to see the value of what could otherwise be thought of as busy work.
- 6 Insufficient training**—Change is hard. Change without adequate training is brutal: Hold thorough trainings on how to use the system. Record them so users can go back and relearn on their own time. Reinforce good habits in weekly meetings.



Execution

- 7 Inconsistent Usage**—Your system is only as good as the intelligence it contains. It is important to consistently log data into the system—following the same protocols across the organization.
- 8 Poor Data Integrity**—Data is rarely evergreen. People come. People go. Organizations merge. Companies fail. Make sure your system is up to date, all fields are correctly populated, and inaccurate data is purged from the system. Always scrub and de-dupe when adding new data.
- 9 No discipline**—Discipline is often tied to accountability: Make your team accountable by managing from CRM. As we often say at NuGrowth, “If it’s not in Salesforce, it didn’t happen.”
- 10 No on-going training**—You trained during adoption, you need to train in an on-going manner. Make this habitual to make the CRM great.



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