8 BIG MISTAKES TO AVOID WHEN IMPLEMENTING SALESFORCE
When implemented correctly, Salesforce is a powerful tool. It empowers nonprofits to accelerate their missions with unified teams, sophisticated campaign management and real-time analytics on the metrics that matter most. If you can dream an automation or feature you’d like your database to have, it’s probably possible with Salesforce.

Adopting it for the first time, however, can be tricky. As Salesforce experts, here are some of the most common pitfalls we see. The great news is that you can take concrete steps right now, before you start your implementation, to entirely avoid these mistakes.
Replacing your current system with Salesforce will be extremely rewarding in the end. But in the meantime, the likely months-long process of implementation will consume a significant amount of staff time. One of the biggest mistakes nonprofits make is failing to appreciate the investment required. As a result, these orgs don’t clear enough room on their calendars.

When implementing functionality that’s mostly “out of the box” with an expert consultant, your internal project manager should expect to devote 20% of their work hours for the duration of the project. But a large, highly customized implementation - with a data migration, or custom integration - can consume 50% of your internal project team’s time. Your mileage may vary.
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It's always a good idea to demonstrate Salesforce to your staff. Ask them to write down their ideas, concerns and requests.

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INSUFFICIENT EXECUTIVE SUPPORT

Senior-level sponsorship is critical. Some nonprofits attempt implementation with only a small portion of their organization buying in. What results is an extremely underutilized tool.

Salesforce can create a full 360-degree view of all your constituents, unifying your staff through access to information about the people that drive your program’s success. If you end up with just a digital rolodex for a handful of your staff, that's a huge waste of potential.

Make sure there's buy-in on the executive level, which enables the release of a project-appropriate budget and other resources for success.

SIDE TIP:
You also need an internal “champion,” someone with both the passion and skillset for the job.
IGNORING YOUR PEOPLE

Salesforce implementation is like any other major project. During the design and discovery phase, the project manager must reach across siloes within the organization.

A big mistake some nonprofits make is not having a true interdepartmental team at this phase. Perhaps an office manager is leading the project, but they fail to engage the marketing, fundraising, and accounting teams on their needs—instead simply making assumptions.

Ask all relevant departments about their relationship management and reporting needs. Build that input into the basic design decisions. Throughout the process, make sure the people working on the implementation represent a cross-functional array of your organization.

SIDE TIP:
Early on, explain to stakeholders all the ways Salesforce will streamline work and save time.

Hold an internal team meeting on the front end. Discuss in detail how any business rules or processes may be affected by the implementation.
Another big front-end faux pas is failing to take account of your analog processes before taking them digital. Maybe your business processes have evolved organically (or maybe various staff members have their own way of doing things), but you must fully outline your processes now before building a database to manage them for you.

How does your organization accept donations? How do you register an attendee for an event? How do you communicate with various types of constituents? Take stock of the offline business tasks first. Only then can you design a database that will take these tasks to the cloud.

SIDE TIP:
Make sure your internal team is on the same page regarding any business rules or processes affected.
Do you know where your data lives now? Take full stock of all your data sources on the front end, or you'll encounter some wasteful surprises halfway through.

Start by listing every legacy system, Google doc, Outlook list, and spreadsheet your staff members rely on. Do a complete inventory of the data and how you plan to use it.

Then, you can begin to cleanse it. This is when you address inaccurate or incomplete data so that the information you migrate into Salesforce will yield accurate reports and helpful insights. Be consistent in which fields are used so that your project manager can effectively match and deduplicate repetitive records.

SIDE TIP:
If you're operating from spreadsheets and files, plan to devote extra time to this stage.

ON THE BLOG:
The Most Thorough Salesforce Data Migration Answers You’ll Ever Get Without Hiring a Consultant
DESIGNING FOR THE STARS

Even when grounded in comprehensive research, design can easily go off the rails. Don’t design for edge cases. If a situation occurs once a year, don’t complicate your day-to-day database by accommodating it. Focus on the broader tasks you need Salesforce to address.

Don’t do too much too soon. Fully automating your system overnight is a tempting thought, but it’s far better to group your automation wish list into phases. Do the low-hanging fruit first. Decide what’s critical for Phase 1, then roll it out. Train people and achieve your user adoption goals while some lower-priority automations remain manual. Then move on to Phase 2.

SIDE TIP:
Don’t catch Shiny Toy Syndrome. Ask yourself, “Does this feature truly advance my mission?”

ON THE BLOG:
A Difference of Needs vs. Requirements
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ROLLING OUT WITH NO PLAN

Training and user adoption should start on Day 1 of the implementation, not weeks or months later, when your new system goes live.

All affected staff should understand what data sources and processes are going away, what’s replacing them, and why. The project team has a critical responsibility to communicate to all stakeholders, not only that changes are coming, but also why those changes are valuable.

Ideally all of these stakeholders would be involved in the initial decision to move off the old system. We’ve seen implementations fail because of resistance from staff. Avoid technology fatigue and underuse entirely by developing an early and effective roll-out plan.

SIDE TIP: Include a “Salesforce Update” in every all-staff meeting so stakeholders feel connected at each stage.
Congratulations! You’ve got Salesforce. Your programming tasks are automated, and your information is accurate and accessible. Don’t let all this great work go to waste!

Going live doesn’t mean you can stop working on your database. From time to time, you need to make financial investments, as well as train staff. You need to send your staff to conferences, possibly hire a fulltime Salesforce admin, or occasionally hire a consultant for special projects.

Having a powerful and fully customizable database like Salesforce means that you have a tool that can grow and evolve with your org. So don’t let it wither on the vine.

**SIDE TIP:** Add a Salesforce line item to your budget as a reminder that strong tools require continued investment.
About KELL Partners

KELL Partners is a consulting firm specializing in Salesforce solutions for nonprofits.

KELL Partners has helped over 900 nonprofits implement and train on the Salesforce platform. With services ranging from KELL360™ to implementations with complex custom needs, application development and data migrations. KELL Partners provides the expertise to set up and configure Salesforce, along with the hands-on training, guidance, ongoing support and consulting nonprofits need to ensure success.

We want to hear from you!

If you want the lowdown on services, solutions, support and all the red-tape defying feats we can do for orgs like yours, get in touch.

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