

Salesforce Implementation Steps

Guide to CRM Success

1

Planning and Preparation

- Discovery and Requirements
- Budget and Timeline
- Team Formation and Roles
- Data Migration

2

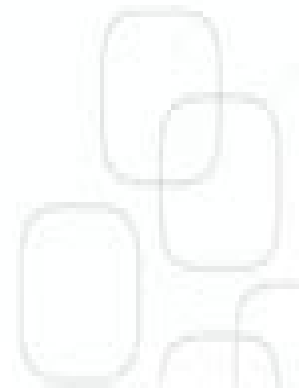
Build and Customization

- Configure Salesforce
- Customization
- Testing and Validation

3

Go-Live and Adoption

- Training and Support
- Change Management
- Launch and Monitoring



Salesforce Crm Implementation Guide

Rachel S Tattersall



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