IDENTIFY YOUR SALESFORCE IMPLEMENTATION VISION AND OBJECTIVES

Establish your goals for a Salesforce implementation by defining your vision, identifying your current pain points, and creating user stories to paint a picture of what your organization wants, and why.

Define Your Salesforce Implementation Project Vision

Define a clear purpose for your Salesforce initiative. What are you trying to accomplish by implementing Salesforce?

Take time to work with key staff to answer these questions. Then use your answers to guide you in crafting your Salesforce implementation project vision.

- What are my organization's goals over the next six months? Year? A few years out?

  Note: Organizational goals are *not* the same as database goals. A sample organizational goal: Our new program is up and running by the end of the year.

- What are our big opportunities?
- What pain points prevent us from growing?
- What processes do we want to improve?
- What problems will implementing Salesforce help us solve? And what areas of our business are we *not* planning to tackle?
- How do our constituents experience our programs and services now? How would we like this experience to change?
- What outcomes will show that we've been successful?

Sample Salesforce Implementation Vision

After we have successfully implemented Salesforce, we'll be able to:

- **Get real-time information about a client** and collaborate with everyone involved in supporting that client.
- **Build and maintain long-term relationships with our major donors.** We'll be able to capture all of our interactions with each donor in one central place, which will clearly show us the depth and breadth of our donors' involvement with our organization.
- **Use Salesforce every day to communicate** with one another about our clients and our work.

Our Salesforce Implementation Vision

After we have successfully implemented Salesforce, we'll be able to:

Identify Your Pain Points

What pain points are the different groups in your organization experiencing?

Sample Pain Points

Stakeholder Group	Pain Points
Executives	• It takes weeks to prepare reports for the board. • It's nearly impossible to get a complete picture of overall progress on client services. Metrics and reports are difficult to assemble.
Development Staff	• When I talk to a prospective donor, I don't always know who's already talked to them. • I'm afraid I'm missing out on company matching gifts.
Marketing Staff	• I can't pull the lists I need to invite people to specific events. • I'm afraid of emailing someone who has opted out of receiving emails from us.
Events Staff	• Our event data is spread across multiple spreadsheets, some of which I don't have access to. • I can't mark excellent speakers in our database—I want to be sure to invite them back, but I can't identify them.
Program Managers	• When people change households, I can't track what services they've already received. • Most of our forms are on paper, and I can't read half of what's written on them.

Our Pain Points

Stakeholder Group	Pain Points
Executives	
Development Staff	
Marketing Staff	
Events Staff	

Stakeholder Group	Pain Points
Program Managers	

Create User Stories To Help Identify Your Goals

Your Salesforce project isn't about implementing a list of features; it's about getting the tools you need to do your good work even better. It's about rescuing more animals, providing meals to more clients, or getting more volunteers involved in cleaning up the environment. Salesforce isn't an end in and of itself—it's a means to furthering your organization's important mission.

To stay focused on what the project is really about, we use a tool called *user stories*. User stories tell us what tasks users want to accomplish with the new system—and why those tasks are important.

A user story is typically structured in three parts, like this:

As a *[who wants this?],* ***I want to*** *[what do you want to be able to do?],* ***so that I can*** . . . *[what will this do for you?]*

For example:

As the Executive Director, I want to see the fundraising projections for the next six months, so that I can give the board an accurate picture of our funding outlook.

Think about how you'll know if the requirements of each story have been successfully met. And assign a priority to help you sort through what you'll tackle first.

Let's look at some real-world examples, so you can get a sense of how user stories work.

Sample User Stories

User Story	How Will You Know It's Been Met?	Priority
As the Executive Director, I want to see the fundraising projections for the next six months, so that I can give the board an accurate picture of our funding outlook.	On the day of my board meeting, I can run a report and trust that the numbers are correct.	High
As a Major Gifts Officer, I want to know where my prospects are in the pipeline, so I can plan and prioritize my activities for the week.	I can see all of my prospects, their status, the last touch, and next steps in one place.	High
As a Program Manager, I want to categorize the type of community care that's being requested, so that I can report on how many people are served within each subprogram.	I have a preconfigured report that shows me the number of people served by subprogram.	Low
As the Volunteer Coordinator, I want to know how many people have signed up for a shift and how many more volunteers we need, so I can focus my recruiting efforts.	I can see a list in one place of volunteer shifts with total volunteer capacity, number of signups, and spots that need to be filled.	Medium

User Story	How Will You Know It's Been Met?	Priority
As the Volunteer Coordinator, I want my volunteers to automatically receive an email with directions to the job site after they sign up for a shift, so that I can free up the time I currently spend phoning them with directions.	I spend less than an hour a week following up with logistical information for new volunteer signups.	High
As a Program Coordinator, I want to be able to quickly generate an intake packet with age-appropriate forms, with as much data prepopulated on the forms as possible, so that I can reduce my prep time for the initial intake visit.	On the day of an intake visit, instead of running around the office grabbing blank forms from different places, I can generate an intake packet with name and other data prepopulated for the client I'm going to visit.	High

Our User Stories

Work with your stakeholders to construct your own user stories. If you've never used this tool, it may take some practice to get the hang of it, but stick with it. Many organizations like yours have found user stories to be invaluable for uncovering their true needs and priorities.

Important: Be sure to include all three parts of the user story, especially the reason (so that I can . . .). These details help you weed out superfluous requirements and stay focused on features that truly give you value.

Each stakeholder group will have many user stories. Capture as many as you can here.

User Story ***As the . . ., I want to . . . so that I can . . .***	How Will You Know It's Been Met?	Priority
As the Executive Director,		
As a Major Gifts Officer,		
As a Program Manager,		
As a Volunteer Coordinator,		
As the Fund Development Director,		