Define User Adoption and Other Success Metrics

When you tackle a big project like a Salesforce implementation, you want the satisfaction of knowing you've been successful—and a way to course correct if you've missed the mark. Defining your user adoption and other metrics before you begin gets you ready to measure the success of your efforts.

User Adoption Metrics

With a Salesforce implementation project, the number one indicator of success is user adoption. Of course, which metrics to use and how often to track them depends on your unique requirements, but we've provided some examples to get you started.

Sample User Adoption Questions and Metrics

Question	Metrics
How many staff are logging in regularly?	Percentage of staff logging in each month
Are users actively engaged with Salesforce?	Number of Contact and Account records created in the past 30 days; frequency of reports being run
Is our donation data being kept up-to-date?	Number of open Opportunities set to close in the next 90 days with no activities in the past 30 days

Tip: When you're closer to rolling out your implementation, download the Salesforce Labs' free Salesforce Adoption Dashboards app. Use it to track user logins, number of records created, report statistics, and much more.

Our User Adoption Questions and Metrics

Question	Metrics

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Other Success Metrics

You may have very specific problems you're trying to solve with Salesforce. Here's your chance to write them down and think through how you'll know if you've solved them.

This is also a good time to review the pain points you identified early on in your planning and determine how you'll know if they've been addressed.

Here are some examples to get you started.

Sample Success Metrics

Question	Metrics
Have we made it easier for our service providers to get data to us?	Average satisfaction score from feedback surveys higher than 3.1 baseline score pre-Salesforce
Are we taking full advantage of company matching gifts?	Percentage of matching gift records for Accounts that do matching; ability to track which Accounts actually do matching
Does the Executive team have a clear view of fundraising projections for the next six months?	Amount of time it takes to assemble board reports

Our Success Metrics

Question	Metrics