



7

Indicators of  
Salesforce  
SUCCESS



**Every Salesforce implementation is unique**, and each requires planning, direction and commitment for success. Some Salesforce projects never get off the ground, while others flounder during planning. **We want every project to succeed wildly.**

501 Partners has completed **over 100 successful implementations** of Salesforce in the nonprofit space. Based on this experience, conversations with **hundreds of other nonprofits** using Salesforce as well as our peers in the consulting world, and partners at the Salesforce Foundation, we have developed a list of the top indicators of a successful Salesforce project.

Our considerable experience shows that **Salesforce is a commitment of time, energy and love for the project.** We encourage you to carefully read through the identified Salesforce Success Indicators, and discuss these with both your in-house and consulting teams at the start of your Salesforce project.

**Nonprofits play a vital role in the health, growth, and well-being of our communities. Technology is a vital piece to supporting your work, and your success is our success.**

# 1

## Clarity, and a Sense of Urgency Around the Project

**Of all of the times to take on a project, *why is now the right time?***

A systems implementation is going to take the time and attention of your organization's key staff, who are probably already juggling a million other high priority items. Determine the sense of urgency to have this project now, at this time. Without urgency buy-in, project completion rates slow down.



# 2

## Organizational Ownership and In-House Champions

**Successful projects have a high level of client engagement, which means that someone must champion this project from the C-Suite.**

In successful implementations, clients commit to own their own learning, thus driving adoption after implementation. Highly engaged clients want to think through questions like “what do you mean by this criterion?” and “how, exactly, do you decide that?” Expecting consultants to do everything behind the scenes and then present a finished project, however, is a recipe for failure.



# 3

## Sufficient Staff Time

**Successful clients understand that Salesforce has to be managed on an ongoing basis, and that domain expertise should reside largely in-house.**

Implementation requires time commitments by executives and staff alike to learn a new system, advise implementation partners on internal language and processes, and make decisions around the inevitable tradeoffs inherent to every Salesforce project. From data input to evaluation and assessment of success, to adaption and adjustment, an ideal implementation would be one in which the whole organization is engaged.



# 4

## A Solid Plan for Ongoing Maintenance

### Who will be responsible for managing your Salesforce system?

In our experience, you will need staff or consultants responsible for the following ongoing tasks: creating and managing reports, system enhancements (adding fields, changing layout, integrating apps, etc.), and new user training. If this person is not in-house, consider whether or not you have the resources to engage a partner in a support contract.

This will likely lead to new fields, new reports and new automations in your data system, and somebody has to be responsible for that. Whether that somebody is internal or external, successful organizations go into a new Salesforce install with a plan.



# 5

## A Culture That Welcomes Continuous Improvement in Data or Operations



**Are you comfortable with the idea of a system that evolves as you use it, so that you're highly unlikely to outgrow in a few years?**

Salesforce doesn't tell you how to use data; it asks you to consider how you will use that data now, and in the future. Adopting a data system that can evolve as you evolve is a strategic decision. As such, it requires the same type of backing. Salesforce shouldn't be a black hole where data goes to be forgotten. It is a living system that supports people in their daily activities.

Salesforce has huge power and flexibility, but it can also feel frustrating if that isn't aligned with your organizational culture and what you want from a system.

# 6

## A Prioritized Wish List

**Adopting Salesforce is often an exercise in budgeting – both time and money – and a willingness to discuss limitations and tradeoffs.**

With such a large, endlessly flexible system that has thousands of extensions and enhancements, plus the ability to develop it yourself if you can't find the right fit, it's very easy to get excited about the possibilities. And you should!

Make a wish list of all the things that could help and all the pain points you want to alleviate. Then take a more real-world look at it after your consulting partner has told you what's easy, what's hard, and what's expensive. Prioritize. Plan to move in phases, with the core functionality first. Be honest with yourselves as an organization about what's necessary to have and what's nice to have.





# 7

## Patience. It Takes Time To Do This Right.

**After over 100 successful implementations, we've come to the conclusion that a Salesforce implementation is best approached like moving to a new city.**

The first few weeks, depending on your personality, you'll either be giddy with all the new stuff to play with, or miserable and hating all the unfamiliar stuff. The next several months will be a slow adaptation phase, where you realize what's missing and what's better (no, you can't get that one brand of cookies you love, but you have found a local bakery with the best pastries you've ever tasted). It's only after about six months that you can make any real decisions about what should change, what's unendurable, and what's become commonplace.

Patience and a commitment to adoption can save wasted time and money on changes that don't really need to be made. It takes time to do this right, and a bit of patience as you begin to understand what you need and want from the system will save a lot of time in the end.





We encourage you to use this guide to consider your organization's preparedness to begin a Salesforce project, and assist you as you develop the right in-house and consulting team to make your project a success.

Clarity, and a Sense of Urgency  
Organizational Ownership and In-House Champions  
Sufficient Staff Time  
A Solid Plan for Ongoing Maintenance  
A Culture That Welcomes Continuous Improvement in Data or Operations  
A Prioritized Wish List  
Patience, It Takes Time To Do This Right

These factors are all relevant indicators of Salesforce success, and they have one thing in common: a commitment to making Salesforce work for your nonprofit organization.

***Ready to begin your Salesforce project?***  
*We're happy to chat with you about your project and help you think it through. Contact [hello@501partners.com](mailto:hello@501partners.com) or call us at 978-232-9200 x201.*