

# Salesforce Best Practices



## ***Test and Retest***

Make sure you thoroughly test changes in your sandbox site before going live.



## ***Keep It Simple***

Not all automations are made equal, make sure they will actually make life easier for your team.



## ***Don't Forget Data Quality***

Be sure to remove duplicates and validate the data as it enters your system.



## ***Designate a Salesforce Guru***

Whether internal or external, have someone in charge of the day-to-day operations.



## ***Know Your Emergency Contact***

Make sure you have someone who can quickly troubleshoot for you.

## About Revenue Ops LLC

Revenue Ops LLC's certified consultants provide senior leadership and individual business units with the information, support and means to make data-driven decisions that maximize revenue. We do this by:

- Building the proper business technology stack.
- Evaluating and optimizing operational business processes and procedures
- Managing data effectively and visualizing analytics.
- Creating realistic forecasts for growth.

Contact us today to learn how we can help you maximize your revenue.