

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

Revenue Ops' 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.

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