

CRM Implementation Whitepaper

A practical whitepaper on Salesforce CRM implementation: six delivery phases, governance that holds up, data migration, adoption and the platform risks to plan for.

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A CRM implementation is a change programme with software in it. The configuration is rarely what goes wrong; scope drift, weak ownership, poor data and low adoption are. This whitepaper sets out a phased approach to Salesforce CRM implementation, the governance that keeps it on track, how to migrate data safely, how to drive adoption, and the platform changes in 2026 and 2027 that belong on your risk register.

WHITEPAPER

Six CRM implementation phases and their exit criteria



1 Discovery Exit: sponsor signs off scope and outcomes	4 Test Exit: no open critical defects; business owners accept
2 Design Exit: design authority approves; open questions have owners	5 Launch Exit: reconciliation passes and the support desk is ready
3 Build Exit: each item meets its acceptance criteria	6 Support Exit: handover to business-as-usual ownership

Treat data migration as its own project with its own owner: it is usually the riskiest workstream.

Each phase ends with a written decision against clear exit criteria, so scope, data and adoption problems surface before go-live. [View full size](#)

1. Start with outcomes, not features

Before any design work, write down the three to five business outcomes the programme exists to deliver, and the measure for each. "Sellers spend less time on admin" is an aim; "seller admin hours per week, measured from activity data" is a measure. Every later scope decision should trace back to one of these outcomes. If a requested feature cannot, it goes on a backlog for later, not into the first release.

Choose the edition with the same discipline. Salesforce simplified its Sales Cloud editions on 3 September 2026 into Free Suite, Starter Suite, Pro Suite, Core, Advanced and Max, and some capabilities are listed as available for purchase rather than included. Salesforce also states that pricing and packaging are subject to change. Record the edition and add-ons each outcome depends on, and confirm them with your account team before design sign-off.

2. The six phases

Implementation phases

Phase	Purpose	Key outputs	Exit criteria
Discovery	Understand processes, data, users and constraints	Current-state maps, outcome measures, risk log	Sponsor signs off scope and outcomes
Design	Decide how Salesforce will support each process	Solution design, data model, integration design, security model	Design authority approves; open questions logged with owners
Build	Configure and develop in iterations	Working features in a development sandbox, unit tests	Each item meets its acceptance criteria

Phase	Purpose	Key outputs	Exit criteria
Test	Prove it works for real users and real data	System, integration and user acceptance test results	No open critical defects; business owners accept
Launch	Move users and data into production	Cutover plan, migrated data, trained users	Reconciliation passes; support desk ready
Support	Stabilise, then improve	Hypercare log, adoption metrics, backlog	Handover to business-as-usual ownership

Each phase should end with a short, written decision, not an assumption that everyone agrees. For the build phase, work in short iterations and show working features to the people who will use them. Late surprises are far cheaper to avoid than to fix. Our [Salesforce implementation checklist](#) breaks these phases into individual tasks.

3. Governance that holds up

Governance is how decisions get made when the plan meets reality. Keep it light, but make it explicit.

Core roles

Role	Responsibility	Typical decision
Executive sponsor	Owens the outcomes and the budget	Approves scope changes that affect cost or dates
Product owner	Owens the backlog and priorities	Decides what goes into each release

Role	Responsibility	Typical decision
Design authority	Guards the architecture and data model	Approves designs that affect security, data or integrations
Data owner	Owens data quality for a domain, such as accounts or products	Signs off migration mappings and cleansing rules
Release manager	Owens environments and deployments	Decides when a release is ready to deploy

Three habits make governance work. First, keep a **decision log** with the date, the decision, who made it and why. Second, use **change control** for anything that touches cost, dates or architecture. Third, hold a regular **design review** so that one-off fixes do not quietly become the architecture. See [programme governance for growing teams](#) for more on cadence.

Plan around the release calendar

Salesforce ships named releases through the year. In 2026, Spring '26 started on 23 February, Summer '26 was generally available on 15 June, and Winter '27 rolled out between September and October, with sandbox preview from 28 August. Put these dates in your plan, test in a preview sandbox before each release reaches production, and avoid scheduling go-live in the same week as a major release.

Release tooling

Agree how changes move between environments before the build starts. Salesforce's Winter '27 platform blog refers to "Lifecycle Center (formerly DevOps Center)", while Trailhead and Help still say DevOps Center, so expect both names. If your team scripts deployments, note that the older `sfdx` (v7) command line "will receive no updates"; use the `sf` (v2) CLI.

4. Data migration

Data migration is usually the riskiest workstream, because errors are discovered by users after go-live. Treat it as its own project with its own owner.

Data migration steps

1 Profile the source

Measure volumes, completeness, duplicates and formats for each source object.

2 Agree ownership

Assign a data owner per domain to make cleansing and mapping decisions.

3 Map fields

Document each source field, its target field and any transformation in a data dictionary.

4 Cleanse and deduplicate

Fix data at the source where possible, and agree survivorship rules for duplicates.

5 Plan the load order

Load parent records before children so relationships resolve, and keep legacy IDs for reconciliation.

6 Run trial loads

Rehearse the full migration in a sandbox at least twice, timing each run.

7 Reconcile

Compare record counts, totals and samples between source and target, and get the data owner's sign-off.

8 Cut over

Freeze source changes, run the final load, reconcile again and switch users over.

The [data dictionary template](#) gives a structure for the mapping document. If forecasting is one of your outcomes, protect opportunity history during migration. Salesforce's Help article on Einstein Forecasting lists at least 12 months of opportunity history, with Amount filled in on at least 80% of open opportunities, among its requirements.

5. Adoption

A CRM that people avoid does not deliver its business case. Plan adoption from discovery, not from the week before launch.

- **Design with users.** Involve a group of sellers or agents in design reviews and acceptance testing.
- **Train by role.** Teach each group the three or four tasks they do every day, in their own process language.
- **Name champions.** A champion in each team answers quick questions and feeds back problems.
- **Meet people where they work.** Salesforce's Winter '27 Trailhead content describes Sales Cloud in Slack and in Microsoft Teams. Check availability and licensing for your edition.
- **Measure usage.** Track logins, records created and key fields completed, by team, from the first week.

6. Risks to plan for

Risk register starters

Risk	Early signal	Mitigation
Scope creep	Backlog grows faster than delivery	Tie every item to an outcome; defer the rest to a later release
Poor data quality	Trial loads fail or reconcile badly	Assign data owners early; cleanse at source

Risk	Early signal	Mitigation
Low adoption	Usage falls after hypercare	Role-based training, champions and usage reporting
Integration authentication changes	Integrations use connected apps or retiring OAuth flows	Build new integrations on External Client Apps; Salesforce says connected app support ends in Summer '27
Retiring login flows	Integrations use username-password OAuth	Salesforce retires the username-password, user-agent and hybrid user-agent flows on 20 February 2027
Old API versions	Integrations call API versions 31.0 to 40.0	These are deprecated in Summer '27 and retired in Summer '28; upgrade them
Product end of sale	Scope assumes Salesforce CPQ for a new customer	CPQ is end of sale, not end of life; new customers cannot buy it, and the successor is Revenue Cloud Advanced

- i Retirement and enforcement dates come from Salesforce's Winter '27 announcements. Check them against Salesforce Help before you plan around them, because dates can move.

Testing new features carefully

Some Winter '27 features are not yet generally available. Flow Test Mode, with saved test scenarios and assertions, is labelled Beta, as are mock outputs for action and subflow elements. Use them in sandboxes, but do not build a test strategy that depends on them alone. The [UAT test plan template](#) helps structure user acceptance testing.

7. Go-live readiness checklist

- Outcomes and measures agreed, with baselines captured before launch.
- No open critical defects, and business owners have accepted the user acceptance tests.
- Data migration rehearsed at least twice, with reconciliation signed off.
- Users trained by role, and champions named.
- Support model, escalation path and hypercare period agreed.
- Integrations checked against the authentication and API version dates above.

Questions we hear

How long does a Salesforce CRM implementation take?

Should we migrate all historical data?

Do we need a design authority on a small programme?

When should training start?

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Sources

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- <https://www.salesforce.com/blog/platform-winter-27-release/>
- <https://admin.salesforce.com/blog/2026/jens-top-winter-27-release-features-for-admins>
- <https://www.salesforce.com/sales/cpq/end-of-life/>
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