



# Salesforce Engage Launch Plan

4 Steps for the Perfect Roll Out



# Salesforce Engage Launch Plan

Change management is tough, and rolling a new tool out to your sales team can seem like a daunting task. **We're here to help.**

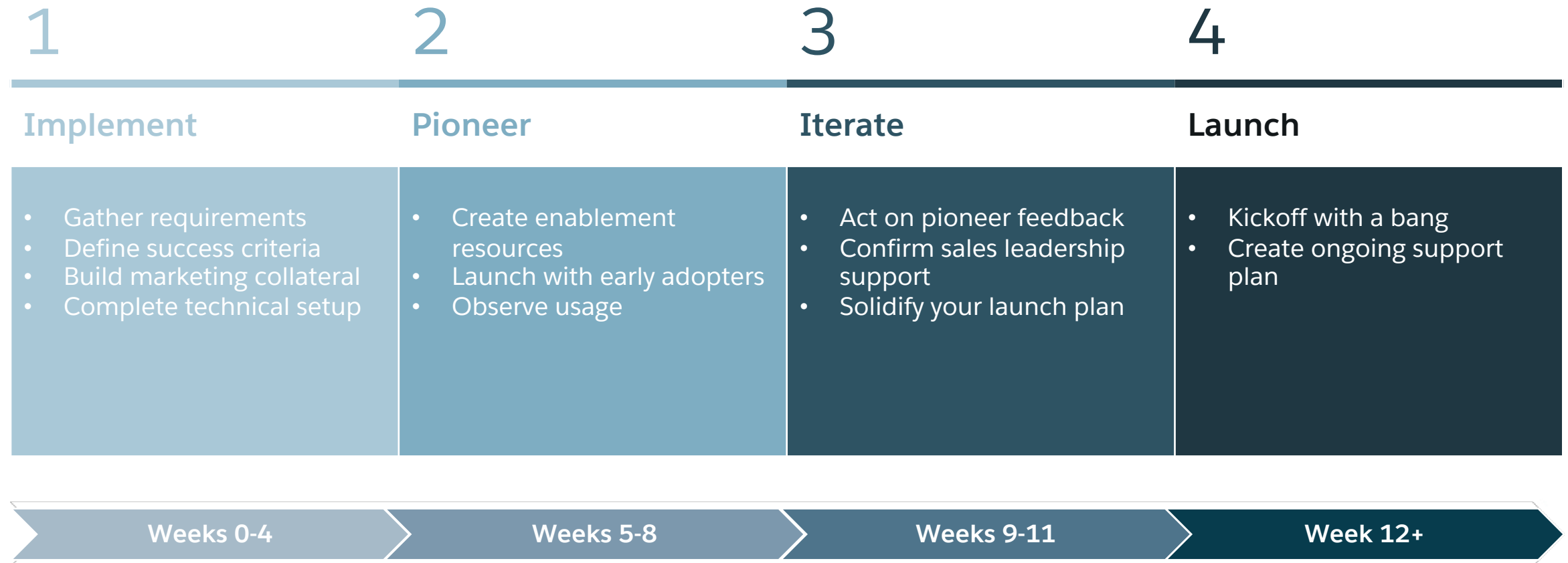
This guide is designed for admins as they prepare to roll out Salesforce Engage.

Inside you'll find our four-phased approach to rolling out Salesforce Engage, including a project timeline, tips for thoughtful planning, and promotion ideas to get your team on board.

- 2 Table of Contents
- 3 Project Timeline
- 4 Implement
- 6 Pioneer
- 8 Iterate
- 10 Launch
- 11 Resources

# Project Timeline

## 4 Steps for the Perfect Roll Out



# Implement

During phase one, focus on planning and preparation.

**Gather requirements**

**Define success criteria**

Build marketing collateral

Complete technical setup

## Gather requirements and define success criteria

The first step in any successful roll out is to gather requirements. Sales and marketing leadership should align on the **types of campaigns you'll run** and the **metrics you'll use to measure success**.

*Is your goal to increase event registration, improve productivity for your business development reps, or re-engage cold leads?*

Ask your sales team what content resonates best with their prospects. They know what works best in the field – and chances are, they have their own list of successful emails and messaging that can be repurposed for your first Engage Campaigns.

Need inspiration? [Find common use cases and sample templates here.](#)

# Implement

Gather requirements

Define success criteria

**Build marketing collateral**

**Complete technical setup**

## Build marketing collateral and complete technical setup

Once you've outlined requirements and defined your success metrics, you'll need to **prepare your marketing collateral** and **complete your technical setup steps**.

### Marketing Collateral

*What email templates, forms, landing pages, and other content do you need to power your Engage Campaigns? Are you planning any nurture programs, which require lists and Engagement Studio programs?*

*Has your team agreed on what defines a qualified lead? Implement your lead scoring and grading strategies to provide further sales insight.*

*Are there pre-defined list views you can set up in Salesforce to help your team easily target the correct Salesforce leads, contacts, and accounts?*

### Technical setup steps

Complete your [Salesforce Engage Admin Installation](#). You'll need to work with both your Pardot and Salesforce Administrators to ensure all tasks are complete.

# Pioneer

In phase two, it's time to test the waters!

## Create enablement resources

Launch with early adopters

Observe usage

## Create enablement resources

Now that your campaigns are ready to go, create some initial support programs and **enablement resources** that you can use to empower your team.

You may consider:

- An Engage user guide, which outlines Engage features and their benefits
- A recorded training webinar or live office hours, to show your team how to use Engage step-by-step
- A campaign cheat-sheet, which introduces your team to the types of templates and nurtures you've made available
- FAQ docs, to serve as your living space for updates and product support

[Pardot has tons of resources](#) to help you understand Engage features and learn how to train your team, but the most effective trainings should be built and delivered by **you** to ensure they resonate with your team.

# Pioneer

Create enablement resources

Launch with early adopters

Observe usage

## Launch with early adopters and observe usage

**Identify your pioneers**, your sales champions and hype-men who are influencers on the team. Recruit them to be your Engage early adopters, and introduce them to Engage for a pilot period. You should aim to include 25-50% of your team in this pioneer group, depending on the size of your sales team.

Arm the pioneers with your enablement resources, and embed yourself with the team as they learn to use the tool. **Observe their usage** using Engage Team Reports and anecdotal interviews. Keep track of how they're performing against your original success metrics.

- *What content works well?*
- *What doesn't?*
- *What's difficult or confusing?*
- *What support resources resonate best with your team?*



# Iterate

Phase three allows for thoughtful reflection and launch planning.

## Act on pioneer feedback

## Confirm sales leadership support

Solidify your launch plan

## Act on pioneer feedback and confirm sales leadership support

Your pioneer phase should have given you great insight into your team's usage, preferences, and training needs. Use this data to optimize your Engage rollout plan. Take the time now to **update your marketing collateral and support resources** per the team's suggestions and needs.

Ensure that marketing and sales leadership meet once again to **confirm all stakeholders are aligned and committed to Engage success**. Use supporting metrics from your pioneer phase to show the value of the tool, and encourage sales leadership to make Engage usage a top priority for their teams.



# Iterate

Phase three allows for thoughtful reflection and launch planning.

Act on pioneer feedback

Confirm sales leadership support

## Solidify your launch plan

### Solidify your launch plan

Cross your t's and dot your i's. This is the time to **make sure your launch plan is bulletproof** before introducing Engage to the masses.

*What programming resonates well with your team?*

Consider implementing:

- Launch communications via email, team meetings, or webinar.
- A Chatter group to store resources and updates in a central spot
- Leaderboards and spiffs for early adopters
- Success stories from your Engage pioneers

# Launch

It's go-time in phase four!  
Launch and maintain.

**Kickoff with a bang**

**Create ongoing support plan**

## Kickoff with a bang and create an ongoing support plan

On launch day, **plan a fun kickoff event** to get your team excited. Timing is crucial – pick a time when your team has the bandwidth to focus on adopting this new tool. Rolling out Engage when your team is frenzied at the end of the quarter won't accomplish much.

Don't forget that your job as an admin doesn't end at launch. *Thoughtful, ongoing sales enablement and support is critical to a successful roll out.* You'll need to think through what type of **long-term support plan** makes the most sense for your time.

Consider a 2-3 week hyper care period of intense support, followed by regular office hours and Chatter communications. Make sure your pioneers are actively involved in onboarding their peers. Listen to feedback carefully, and iterate constantly until Engage becomes engrained in your team's day-to-day.

# Learn More

Resources to help you get started

Pardot Premier*	All Customers
<b>Admin Assist</b> <ul style="list-style-type: none"><li>• <a href="#">Engage License Assignment</a></li></ul>	<b>Getting Started with Salesforce Engage</b> <ul style="list-style-type: none"><li>• <a href="#">Guide for Admin User</a></li><li>• <a href="#">Guide for Sales User</a></li><li>• <a href="#">Salesforce Engage Fast Start Accelerator LIVE Webinar</a></li></ul>

Thank You

