Salesforce Implementation Plan

Platform: Salesforce + HubSpot | **Type:** Implementation Planning | **Prepared by:** RevPal

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Executive Summary

The client is migrating from HubSpot to Salesforce Enterprise Edition. This plan synthesizes three inputs: the client's Implementation Packet (business requirements), RevPal's HubSpot Pipeline Assessment (current-state data quality audit), and a Salesforce Discovery (clean-slate org inventory). The goal is to build a Salesforce instance that preserves what works today, avoids replicating HubSpot's broken patterns, and establishes data discipline from day one.

Current State: HubSpot composite health score of 3.2/10 — 0% deal amounts, broken lifecycle automation, 95% empty custom fields, low win rate, majority of deals stalled in early stages.

Target State: Salesforce with enforced data quality, calibrated pipeline probabilities, warehouse-fed account data, and clean automation.

Team Composition

- **Client RevOps Lead** — Head of RevOps, recently hired, team of one
- **GTM Team:** BDRs, AEs, AMs, hiring additional roles. ~15-18 total users at go-live.
- **Leadership/Power Users:** Client RevOps Lead, CFO, CRO, Head of GTM, Head of Partnerships

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1. What Works Today (Carry Forward)

These patterns from HubSpot and the implementation packet are solid and should be preserved in Salesforce:

Pattern	Evidence	SF Implementation
Deal owner discipline	100% fill rate in HubSpot	Account & Opportunity ownership required at creation
Close date discipline	98% fill rate	Close Date required field (standard) + validation rule preventing blank
Deal type tagging	72% fill rate	Opportunity Record Types (New Business, Amendment, Renewal)
Pipeline architecture intent	Multiple pipelines with logical design	Record Types with distinct Sales Processes
Deal stage automation	Active workflows with healthy triggers	Salesforce Flows replacing HubSpot workflows
Unit count sync	Active workflow populating unit counts	Warehouse-fed field on Account; formula rollup to Opportunity
Territory model	Clear regional split by state	Territory assignment rules in Lead routing
Stage definitions	Well-defined stage logic per pipeline	Sales Process per Record Type with gate criteria
Amount hierarchy	Predicted > Contract > Override > Manual	Flow-stamped field preserving point-in-time values
Lead routing logic	State > territory > unit count tiers	Lead assignment rules + auto-DQ flow
Account hierarchy	Parent/child for economic vs operational	Standard Account hierarchy + Group lookup

2. What's Broken Today (Do Not Replicate)

These HubSpot patterns must be explicitly left behind:

Anti-Pattern	Impact	SF Prevention
Auto-deal creation without qualification	80%+ stalled in early stage; pipeline noise	Opportunities created at qualification
Disabled lifecycle automation	Multiple broken workflows never fixed	Build lifecycle correctly from day one; no disabled flows
0% deal amount	No revenue visibility; formula workflow was disabled	Validation rule: Amount required before advancing past initial stages
95% empty custom properties	Vast majority of contact fields at 0% fill	Only create fields that will be used and maintained
Unowned contacts	50%+ of contacts have no owner	Ownership required at creation via assignment rules
Ghost pipeline	Hundreds of stalled deals in early stages	Stall detection flow with stage-specific SLAs
Empty pipelines	Unused pipelines with 0 deals	Do not create unused pipelines
Uncalibrated probabilities	Stage probabilities misaligned with actual win rate	Calibrate from day one using historical data

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3. Implementation Roadmap

Phase 0: Schema & Architecture (Weeks 1-2)

Purpose: Lock the data model so the warehouse team can start building pipelines.

Deliverables:

- Object architecture documented (Account, Contact, Lead, Opportunity, Contract, custom objects)
- Custom field definitions for all objects (names, types, picklist values)
- Warehouse-sync field identification (read-only fields flagged in schema doc)
- **Demand Funnel stage definitions** with exit criteria and automation triggers
- **Prospect Status values** with stage tie-ins
- **Qualification Status taxonomy** (DQ and Recycle reasons with owner and stage update rules)
- Opportunity Record Types defined:
  - **New Business** — New logo acquisition across all product lines
  - **Amendment** — Expansions, upgrades, cross-sells, product additions on existing accounts
  - **Renewal** — Contract renewals
- Sales Process per Record Type with calibrated stage probabilities
- Specialty product stages handled via picklist + status field overlay (not a separate Record Type)
- Closed Lost Reasons — context-aware by Record Type (see Design Decisions)
- Page layout wireframes per role (AE, AM, BDR, COM, RevOps)
- **Gate:** Schema document delivered to warehouse team

Phase 1: Core Object Build (Weeks 2-4)

Purpose: Build the Account, Contact, Lead, Opportunity, and Contract objects.

Deliverables:

- Custom fields on Account (Customer ID, Status, Product Type, Segment, Tier, Territory, Group, Qualification Status, HubSpot Company ID)
- Custom fields on Contact (Role, Demand Funnel Stage, Prospect Status, Qualification Status, MQL Type, MQL Date, SAL Date, SQO Date, First/Last Touch Campaign + dates)
- Custom fields on Lead (unit count, source values, partner attribution, state)
- Custom fields on Opportunity (amount hierarchy fields, specialty status, campaign attribution, BDR source, COM)
- Contract object configuration
- Custom objects for market/territory mapping (many-to-many junction), including product availability tracking per market
- Opportunity Products (Product2 / PricebookEntry / OpportunityLineItem) for all product lines
- Validation rules (required fields at stage gates, amount enforcement)
- Account Teams & Opportunity Teams configuration with standard roles
- Record types and page layouts per role
- Account.Type standard field configuration with Record Type restrictions
- Partner Account Record Type with dedicated layout

Phase 2: Automation & Routing (Weeks 3-5)

Purpose: Build the automation layer that prevents data quality decay.

Deliverables:

- Inbound routing from HubSpot: All inbound hand-raisers route from HubSpot to SF as Accounts + Contacts (not Leads). Recent conversion tracking on Contact identifies recent hand-raisers.
- Lead assignment rules (state > territory > AE) for outbound/BDR-sourced Leads created natively in SF
- Lead qualification flow with tiered auto-DQ, manual review, and auto-response thresholds
- Opportunity stage validation rules (required fields per stage gate)
- Amount hierarchy (flow-stamped): Record-triggered flow calculates Amount using priority hierarchy and stamps on the standard Amount field. Preserves point-in-time values.
- Auto-renewal opportunity creation on Closed Won
- Stall detection flow with stage-specific SLAs
- **Demand Funnel Progression flows** (high watermark — stages never regress):
  - Default stage on Contact creation
  - Engagement trigger on campaign or web activity
  - MQL trigger on form submission / demo request with type and date stamps
  - SAL auto-stamp on Opportunity creation
  - SQO auto-stamp on stage promotion
  - Customer stamp on Closed Won
- **Prospect Status automation** with recycling and disqualification flows
- **Campaign Attribution flows:**
  - First Touch / Last Touch stamps on Contact via CampaignMember triggers
  - Opportunity Attribution stamp from Contact's Last Touch
  - Primary Contact requirement on Opportunity creation
- **Closed-loop handoff flow:** MQL event → AE routing → Stage 0 creation (SAL) → Qualification → SQO/Recycle/DQ paths
- BDR comp tracking with persistent source attribution through ownership transfer
- Einstein Activity Capture configuration
- Email templates for lead routing responses

Phase 3: Integrations (Weeks 4-6)

Purpose: Connect external systems.

Deliverables:

- Call intelligence integration — day one requirement
- HubSpot < > Salesforce sync — required for marketing intake layer (go-live gate)
- Warehouse > SF schema handoff + field mapping validation
- Outbound tool integration approach

Phase 4: Data Migration (Weeks 5-7) — IN PROGRESS

Purpose: Selective migration from HubSpot.

Scope:

- Active accounts with associated contacts
- Open, actively worked pipeline (NOT stalled early-stage deals)
- Closed-won deal history — last 12 months with amount > 0
- Key contacts on active accounts
- Lead source attribution (where it exists)

Exclude:

- Stalled early-stage deals (ghost pipeline)
- Contacts with no account association
- Deal records with no amount
- Unused custom properties

Process:

- Data cleaning in staging CSV before import
- Test migration in Full Copy Sandbox first
- Field mapping validation against schema document

Progress:

Milestone	Status	Details
HubSpot contact export	Complete	~24K contacts exported with all properties
Company association export	Complete	~25K association rows linking contacts to companies
Deal association export	Complete	~1.8K association rows linking contacts to deals
Company enrichment (web scraping)	Complete	~14K companies enriched with addresses, titles, descriptions, industry
SF Account creation (enriched companies)	Complete	~13K Accounts created from enriched HubSpot companies
SF Account creation (new discoveries)	Complete	Additional newly-discovered companies created
SF Account ID enrichment	Complete	~19K contacts matched to SF Accounts via HubSpot Company ID
Account Type backfill	Complete	All accounts typed correctly by Record Type
Qualification Status field	Complete	Deployed for data quality triage
Contact import to SF	Not started	Pending qualification review of enriched contact data
Deal/Opportunity import	Not started	Pending contact import

Phase 5: Reports, Dashboards & UAT (Weeks 6-8)

Purpose: Build visibility layer and validate with users.

Deliverables:

- Pipeline health dashboard (count + weighted value)
- Forecast by category (Pipeline, Best Case, Commit, Closed, Omit)
- Closed revenue by period
- Lead conversion by source
- Account status distribution
- Executive summary dashboard
- BDR comp reporting (meetings set / meetings held)
- User acceptance testing per role

Phase 6: Go-Live & Cutover (Weeks 8-9)

Purpose: Coordinated switch from HubSpot to Salesforce.

Go-Live Gates (all must pass):

- [ ] Warehouse sync live and tested against production
- [ ] HubSpot <> Salesforce sync live and tested
- [ ] Call intelligence connected and functional
- [ ] UAT passed for all roles

Cutover Activities:

- Deploy validated sandbox configuration to production via changeset/metadata deploy
- **User Training — Leadership Track:** Dashboard walkthrough, forecast categories, report navigation for power users who know CRM concepts
- **User Training — GTM Team Track:** Full CRM training covering daily workflows per role, data entry standards, report access for team members new to CRM
- HubSpot deactivation plan (marketing intake layer stays; sales workflow moves to SF)
- Parallel run or hard cutover (decision needed — see Open Questions)

Build Environment

All development and testing happens in the client's **Full Copy Salesforce Sandbox** before production deployment:

- **Phases 0-2:** Built and validated in sandbox
- **Phase 4:** Test migration runs against sandbox
- **Phase 5:** Users test in sandbox before cutover
- **Production deploy:** Changeset or metadata deploy from sandbox > production once UAT passes

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4. Object & Field Architecture

See SCHEMA_DOCUMENT for the complete field-level schema.

Object Model Summary

```
Account (Standard)
  ├── Record Types: Customer, Prospect, Partner
  ├── Account Team Members (AE, AM, BDR, COM, Partner Manager)
  ├── Contacts (standard lookup)
  ├── Opportunities (standard lookup)
  │   ├── Record Types: New Business, Amendment, Renewal
  │   ├── Opportunity Products (OpportunityLineItem)
  │   ├── Opportunity Team Members
  │   └── Opportunity Contact Roles
  ├── Contracts (standard lookup)
  ├── Junction Object → Market/Territory Custom Object
  └── Parent Account (self-lookup for hierarchy)

Lead (Standard)
  └── Converts to: Account + Contact + Opportunity

Market (Custom)
  ├── Market Name, Territory, Active Flag
  └── Junction Object → Account
```

Warehouse-Sync Fields (Read-Only from SF Perspective)

These fields are populated by the warehouse team and should not be manually edited in SF:

Object	Field	Update Frequency
Account	Customer ID	On creation
Account	Account Status	Nightly
Account	Total Unit Count	Nightly
Junction Object	Volume Metric	Nightly
Junction Object	Market Status	Nightly
Opportunity	Contract Value	On contract execution

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5. Design Decisions

D1: Amount Hierarchy — Flow-Stamped Field

A record-triggered flow calculates the Amount using a priority hierarchy: `Override > Contract > Predicted`. The flow fires on create or edit of any source field and stamps the result on the standard Amount field.

Why flow-stamped instead of formula: Formula fields rewrite history on change — if a Contract Value is updated 6 months later, the formula would retroactively change the Amount on historical Opportunities. Flow-stamped preserves the point-in-time value, which is critical for accurate historical reporting and revenue recognition.

D2: Product Type Tracking — Opportunity Products (Not Multi-Select Picklist)

- **Product2 / PricebookEntry:** Products for each product line
- **OpportunityLineItem:** Each Opportunity gets one or more Product Line Items with quantity, unit price, and total
- **Specialty products:** Handled as own Product Line Item with custom pricing — never blended with core revenue
- **Account-level Product Type:** Derived from active Opportunities via flow for at-a-glance visibility

D3: BDR Activity Framework — BDR Creates the Opportunity

- **"Meetings Set"** = BDR creates Opportunity at initial stage. BDR attribution persists through ownership transfer via dedicated lookup field.
- **"Meetings Held"** = Opportunity advances to next stage = meeting held.
- **BDR Comp Report:** Opportunities where BDR Source is populated, grouped by BDR, counts at set and held milestones.

D4: Market Object — Many-to-Many Territory Relationship

- **Market custom object:** Market Name, active flag, territory assignment, unit count rollup, product availability (tracks which products are available in each market)
- **Junction object:** Account + Market with status and warehouse-fed volume metrics
- **Reporting value:** "Accounts in markets the client serves where account is In-Market but not Active" = expansion pipeline
- **Future validation:** Product availability enables rules preventing creation of product-specific opportunities in markets where that product is not available

D5: Partner Attribution — Partner Account Record Type + Deal Registration Foundation

- **Partner Account Record Type** with dedicated page layout: Partner Tier, Agreement Type, Agreement Dates, Comp Terms, Partner Manager, Active/Inactive status
- **Partner fields on Opportunity:** Partner Account lookup, Partner Sourced flag, Revenue Share
- **Short-term:** Manual creation with required Partner Account and Lead Source
- **Long-term:** Deal Registration portal
- **ROE enforcement:** Validation rule or flow to check active direct pipeline, registration window, partner tier

D6: Warehouse Schema Timing — Week 2 Deliverable

Schema document finalized by end of Week 2. Includes: field API names, data types, picklist values, update frequency, and object mapping.

D7: Lead vs Contact Architecture — Open for Sandbox Experimentation

Client RevOps Lead expressed preference for using Leads but is open to a Contacts-only approach. Both architectures remain viable. The final decision will be made after sandbox experimentation in Phase 1, as it affects inbound routing design, data migration strategy, and reporting architecture.

GTM Architecture alignment: The demand funnel framework assumes a Contact-centric model (Contact → Account → Opportunity). If the Lead object is used for outbound, Lead Status maps to Prospect Status, and conversion to Contact inherits the demand funnel stage.

D8: Activity Tracking — Einstein Activity Capture

- Auto-syncs emails and calendar events into SF Activity Timeline
- Included with Enterprise Edition (no additional license cost)
- Works alongside call intelligence integration

D9: Data Migration Scope

- All active accounts + their contacts
- Closed-won deals from last 12 months with amount > 0
- Open pipeline past initial stage with recent activity
- Lead source attribution where it exists
- Exclude: stalled early-stage deals, unassociated contacts, zero-amount deals

D10: Demand Funnel & Prospect Status Framework

Dual-track model:

- **Demand Funnel Stage** (on Contact) = Where in the journey. Marketing-driven. High watermark — once a prospect advances, they never regress.
- **Prospect Status** (on Contact) = Real-time engagement state. Sales-driven. Can move freely between states.

Demand Funnel Stages:

Stage	Definition	Trigger
Stage 1	Info in system, no tracked action	Contact created (default)
Stage 2	Engaged via demand channels but no buying interest	Web activity or campaign engagement
Stage 3	Explicit hand-raise or score threshold	Form submission or scoring model
Stage 4	Agreed to conversation, Opportunity created	Opp created at initial stage
Stage 5	Qualified, promoted to active pipeline	Opp reaches qualification milestone
Stage 6	Deal closed won	Opp = Closed Won

High watermark principle: Stages never regress. A Contact who reaches Stage 3 stays at Stage 3 even if they stop engaging. The Prospect Status tracks current engagement state separately.

Closed-loop handoff:

```
Marketing Channels → Score/Conversion → Qualification Event → Route to
AE →
  → AE schedules conversation (SAL) →
    → Qualification Call →
      → Active Pipeline: quantifiable need, dollar value, close date es
timate
      → Recycled: otherwise valid but next steps don't materialize (res
t period)
      → Disqualified: does not meet qualification criteria
```

Closed Lost Reasons — Context-Aware by Record Type

New Business Closed Lost:

- Unqualified — Below Threshold
- Unqualified — Outside Service Area
- Unqualified — Wrong Stakeholder Level
- Unqualified — Poor Fit
- Timing — Not Ready Now
- Went with Competitor (+ Competitor Name required)
- Went with Internal Solution
- Budget Constraints
- Unresponsive / No Response

Amendment Closed Lost:

- Customer Service Issues
- No Growth / Expansion Need
- Budget Constraints / Downsizing
- Competitor Displacement (partial)
- Timing — Not Ready for Expansion

Renewal Closed Lost (= Churn):

- Churned to Competitor (+ Competitor Name required)
- Customer Service Issues
- Poor Product / Service Experience
- Company Acquisition / Merger
- Downsizing Budget / Cost Optimization
- Went with Internal Solution
- No Longer Need Service

Opportunity Sales Processes

New Business:

Stage	Probability	Gate Criteria
Qualify	10%	Threshold met, market confirmed, stakeholder identified
Discovery	20%	Needs confirmed, product fit assessed
Negotiating	50%	Proposal sent, pricing discussed
Contract Signed	90%	Contract executed
Closed Won	100%	—
Closed Lost	0%	Closed Lost Reason required

Amendment:

Stage	Probability	Gate Criteria
Identified	10%	Expansion type classified
Scoping	25%	Scope defined, products selected
Proposal	50%	Proposal delivered
Negotiating	75%	Active negotiation
Closed Won	100%	—
Closed Lost	0%	Closed Lost Reason required

Renewal:

Stage	Probability	Gate Criteria
Pre-Renewal	80%	Auto-created at original Closed Won
Renewal Discussion	70%	Active renewal conversation
Proposal Sent	80%	Renewal terms proposed
Negotiating	85%	Active negotiation
Closed Won	100%	—
Closed Lost	0%	Closed Lost Reason required (= churn)

6. Open Questions

See **OPEN_QUESTIONS** document for the complete list of questions that must be answered before building.

7. Verification Plan

Test	Method	Pass Criteria
Schema validation	Compare SF field list against schema doc	All warehouse-sync fields exist with correct API names and types
Lead routing	Submit test leads for each region and tier	Correct territory assignment and AE routing
Amount flow	Create Opps with various source field combos	Flow-stamped Amount calculates correctly; historical values preserved
Stage gate validation	Attempt to advance Opps without required fields	Validation rules fire; advancement blocked
Integration test	Make a test call	Call logged to correct SF record
Report validation	Run each dashboard against known data	Counts match expected values
Role-based UAT	One user per role walks through daily workflow	All roles can complete their core tasks

Appendix: Roadmap Timeline

```
Week  1  2  3  4  5  6  7  8  9
      |--Phase 0--|
         |-----Phase 1------|
            |-----Phase 2------|
               |-----Phase 3------|
                  |-----Phase 4------|
                     |-----Phase 5------|
                                    |--Phase 6--|
```

Critical Path: Phase 0 (schema) > Phase 3 (HubSpot sync) > Phase 6 (go-live). The warehouse team and HubSpot sync are the long poles.