salesnexus
Target, Connect, Convert

Implementation Checklist

Discovery meeting

- ☐ Identify business priorities
- ☐ Set up timelines

User & Profile Setup

- ☐ Setup Company Profile
- ☐ Additional User Creation
- ☐ Saved Lookup Creation (setup at least one saved lookup for each user in training)
  Role based layouts and lookups
  Security Settings

Data Preparation & Migration

- ☐ Send data to migrate
- ☐ Mapping your data to SalesNexus
- ☐ Setup custom fields & layouts
- ☐ Load data (dry run for QA example)
- ☐ Data Migration/Contact Import

Email Generation

- ☐ Email Template & Campaign Creation
- ☐ DKIM & DMARC Setup
- ☐ Email Capture Setup

System Configuration & Integration

- ☐ Lead Capture Setup
- ☐ Automation Workflow Development
- ☐ Dashboard Configuration

Client Enablement

- ☐ Client Training (1–2 hours)