

Salesforce RevOps Setup Checklist

220 checkpoints across 12 modules. Stop guessing at Salesforce — ship a clean CRM setup in days, not months.

220

Checkpoints

12

Modules

2–5

Days to complete

Every configuration decision, in the right order.

MODULE 1

Org Setup & Security

Profiles, roles, permission sets

MODULE 2

Lead Configuration

Fields, assignment rules, routing

MODULE 3

Contact & Account Setup

Field config, hierarchy, ownership

MODULE 4

Opportunity Management

Stages, exit criteria, fields

MODULE 5

Pipeline Stage Design

Stage definitions + probability

MODULE 6

Sales Process Automation

Flows, alerts, task automation

MODULE 7

Products & Price Books

Catalog setup, CPQ prep

MODULE 8

Reporting & Dashboards

10 must-have reports included

MODULE 9

Data Hygiene Rules

Validation, dedup, governance

MODULE 10

Integration Checklist

Gong, Outreach, Marketo, Clari

MODULE 11

Rep Onboarding Setup

Training, adoption, views

MODULE 12

Admin & Maintenance

Change management, audit log

Each item tells you **WHAT** to do and **WHY** it matters.

☐ **Set stage probability percentages to match your actual historical win rates**

Why: Default probabilities (10%, 20%, 40%...) are fictional. Your weighted forecast will be wrong until these match reality. Pull your last 12 months of data first.

☐ **Enable Duplicate Management rules for Leads and Contacts**

Why: Duplicate records are the #1 cause of bad reporting and rep confusion. Set this up before any data imports — fixing dupes after the fact takes 10x longer.

☐ **Create a Close Date Required validation rule on Opportunities**

Why: Without required close dates, your pipeline report is noise. Reps will leave them blank or use default dates that corrupt your forecast.

☐ **Configure Gong Activity Logging to Salesforce (bi-directional sync)**

Why: Without the Gong sync, call activity doesn't appear on the Opportunity record. Your CRM becomes a filing cabinet instead of a system of record.

☐ **Build the Pipeline Coverage Ratio report (by rep and segment)**

Why: Coverage ratio is the leading indicator of whether you'll hit your number. Most teams don't see it until the quarter is already lost.



Your Salesforce setup, done right.

220 checkpoints, in the right order, with the context to understand why each one matters. Open the Notion or PDF version and start today.

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