What to expect

Make the switch: Salesforce to Copper.

How to prepare for onboarding Copper CRM

So you're thinking about moving from Salesforce to Copper for your CRM system — but it sounds overwhelming just thinking about it. We know it's easier to make an important software decision when you know exactly what to expect, including:

- The required time and resources for implementation and management
- Any additional costs, like retaining an outside consultant
- How easy it is to gain team buy-in

Let's dive into details on the implementation process to help your team prepare and ensure a smooth onboarding process.

Preparing to onboard

Adopting new software sucks; we get it. And when you're moving from a CRM system as complex as Salesforce, chances are you're already more than a bit wary of setting up yet another system.

One of the main differences with Copper is that it's so easy to use, your team can:

- Get started on your own right away with in-app tours, videos and our Copper Community
- Complete account setup in a matter of days (not weeks) so users can hit the ground running
- Skip the intensive training and external consultants needed for other CRM software

Best of all, by empowering every user with the resources and access to get started on Copper from Day 1, gaining team buy-in is much easier.

4 questions to answer ahead of time

Gather together your core team who will be responsible for overseeing this software transition. It's important for everyone to be on the same page about plans for your Copper account, which is why we recommend preparing answers to the 4 Ws to help you get ready to onboard.

With clarity around these main points, you'll be poised to navigate through the next steps after signing up for a Copper account. In the product, you'll be guided through the basic setup process, and our team will be available to provide additional implementation support as needed.

1. **Who is using your CRM system?**
   Your sales team, account managers, customer success reps, executives or all of the above.

2. **Why did you switch to Copper?**
   Think back to the specific problem areas that made you look for a new solution, from lack of visibility into sales activities, to redundant, overly complex or manual processes — or failure for your team to adopt the software.

3. **What are you doing in your CRM system?**
   Chances are, there are several processes that you'll be handling regularly in CRM, so make sure to pinpoint the most critical ones — like organizing contacts, managing deals, reporting on revenue, nurturing leads, automating reminders or tasks.

4. **Where are you currently managing processes?**
   Is your team working exclusively in Salesforce, or are there other spreadsheets where you track critical information? Make sure to pinpoint every relevant source so that you import all critical data from the beginning.

5 onboarding steps for larger teams

If you need more assistance, eligible customers* can partner with Copper in the implementation, adoption and evolution of the system. Our entire team is at your service, from your Onboarding Specialist, to your Account Manager and Customer Success Manager, and the whole Support team.

For larger teams

During onboarding, we empower you with the right resources and support to guide you through the entire journey. Here's what the process looks like for eligible accounts*:

1. **Kickoff call with your Onboarding Specialist**
   We get to know your company and business model, and chat with you about your goals and how you plan to use Copper.

2. **Customizations**
   We discuss any specialized setup, features or custom-built integrations you need (to align with or refine your Salesforce instance) and then we train you on how to get it done.

3. **Data migration**
   We walk you through how to export your data from Salesforce, which files you need, how to migrate your activity data, and more.

4. **Advanced features training**
   Think of it as "Copper 201." Based on your needs and use case, your Onboarding Specialist can walk you through integrations, reporting, workflow automation and marketing tools.

5. **Transition to account management**
   As the final step, we share all the additional resources available to your team and schedule a check-in session in 30 days to see how things are going.

**Full-service onboarding is available for customers that meet a minimum seat threshold.*

And that's just the beginning; your organization will count on ongoing support from your Copper account management team, which is available on demand to assist you with your Copper instance. As your business evolves and scales, we're here to help you continue to customize and modify your use of Copper to meet your business' shifting needs.

Take the next step with Copper

If you'd like more information about switching to Copper as your CRM solution, and how to qualify for our onboarding program, [schedule a free demo](#) with one of our specialists today.