



## 10 Salesforce Setup Mistakes That Are Costing You Leads & Revenue

Salesforce is a powerful platform — but without the right setup, it can become an expensive, overcomplicated database that your team avoids using. We've audited dozens of Salesforce instances and found the same costly mistakes cropping up time and again. This guide shows you how to spot them, why they're costing you money, and how to start fixing them.

### 1. No defined lead source tracking

What it looks like: Leads come in from multiple channels but there's no clear or consistent way to see where they originated.

Why it's a problem: You can't measure ROI accurately or know which marketing activities are worth the spend.

Quick fix: Implement consistent lead source picklists and ensure every record is tagged correctly.

### 2. Overcomplicated page layouts

What it looks like: Users see dozens of fields on each record, most of which they never use.

Why it's a problem: Slows down data entry, reduces adoption, and increases error rates.

Quick fix: Remove unused fields and rearrange layouts to match daily workflows.

### 3. Missing required fields for key processes

What it looks like: Deals move through stages without critical data like contact details or budget recorded.

Why it's a problem: Leads to poor handovers and incomplete records that are hard to work with later.

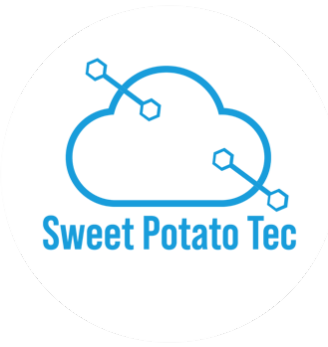
Quick fix: Set mandatory fields for important process milestones.

### 4. Duplicate record chaos

What it looks like: The same contact appears three times — from different imports, web forms, or manual entries.

Why it's a problem: Wastes time, confuses your team, and leads to embarrassing duplicate communications.

Quick fix: Enable duplicate rules, merge existing duplicates, and set up preventative measures.



### **5. Ignored validation rules**

What it looks like: Data is entered in inconsistent formats or with missing details.

Why it's a problem: Makes reporting unreliable and slows down automation.

Quick fix: Create rules that enforce correct data formats and required information.

### **6. Poorly designed sales stages**

What it looks like: Stages are unclear or don't match the real sales process.

Why it's a problem: Reps move deals inaccurately, making forecasting unreliable.

Quick fix: Simplify stages and align them with measurable actions.

### **7. No automation for routine tasks**

What it looks like: Reps manually create reminders or send follow-ups.

Why it's a problem: Wastes hours every week and increases the risk of missed opportunities.

Quick fix: Use built-in tools to trigger follow-ups and notifications automatically.

### **8. Underused dashboards**

What it looks like: Managers rely on ad-hoc reports instead of live, visual dashboards.

Why it's a problem: Slows decision-making and hides performance issues.

Quick fix: Create role-specific dashboards that show relevant KPIs at a glance.

### **9. Unclear ownership of records**

What it looks like: Leads and accounts sit unassigned or are claimed by multiple reps.

Why it's a problem: Causes delays in follow-up and disputes over commission.

Quick fix: Set clear rules for ownership and reassign stale records.

### **10. No ongoing user training**

What it looks like: Teams rely on outdated processes and forget best practices.

Why it's a problem: Adoption drops and errors creep in over time.

Quick fix: Run quarterly training sessions with relevant, real-world examples.

Want to know how your Salesforce stacks up? Book a free 15-minute Salesforce Health Check with Sweet Potato Tec.

---