



# Your Summer '25 Readiness Checklist

Getting the most from the Salesforce Summer '25 Release requires more than awareness—it takes structured action, role clarity, and shared timelines. This checklist is built to help your teams prepare in sync, avoid last-minute disruptions, and adopt the right features faster.

We've organized the checklist into 5 practical components, each designed to support Admins, RevOps (Sales and Marketing), IT, and Leadership stakeholders in doing their part.





# Calendar of Prep Milestones

Stay on track with key release milestones and internal deadlines. This timeline includes:

- Apr 23** Review release notes and highlight impact areas
- May 02** Deadline to opt in to sandbox preview
- May 09** Begin sandbox testing and cross-team collaboration
- May 20 - Jun 03** Attend Release Readiness Live sessions
- May 16, 06 & 13** Go-live weekend (check your org's instance)

## Internal Milestones:



# Readiness Questions for Each Team

Use these prompts to spark internal reviews and action planning.

## For Admins

- Have we tested Flows, automations, and page layouts in sandbox?
- Are there any metadata or permission set changes that require cleanup?
- Do we need to update documentation or internal help guides?

## For RevOps

- Will new features impact how we calculate revenue or attribution?
- Are our dashboards, reports, and pipeline fields aligned to current processes?
- Are we building a case for using any of the new automation or AI features?

## For IT & Architects

- Have we validated all integrations for API compatibility?
- Are there any known risks tied to data flows, syncs, or connected apps?
- Do we need to coordinate test cycles with external vendors or platforms?

## For Leadership

- Which business goals align with Summer '25 feature enhancements?
- Who owns feature adoption tracking for each function?
- Are enablement and change management teams looped in?

## For Developers

- Which custom code or integrations need updates for Summer '25 compatibility?
- Who owns testing and deployment of changes tied to new features?
- Are DevOps and QA processes aligned with the Summer '25 release timeline?

# Feature Tracking Grid

Organize which Summer '25 features your org plans to adopt—and who owns what.

Feature	Team Impacted	Owner	Notes
Dynamic Forms for Opportunities	Sales Ops	Admin Team	Verify layout performance
Einstein Prompt Builder	RevOps, Sales, Marketing	Salesforce Admin	Use for outbound messaging
Data Cloud Segmentation	Marketing, IT	Architect	Confirm privacy filters

Use this grid to assign ownership, track testing, and document blockers across teams.



# Enablement Plan Template

A repeatable structure to train users on new features:

- 1** Identify features requiring user adoption (e.g., new UI layouts, dashboards, Copilot tools)
- 2** Build concise training guides or Loom walkthroughs
- 3** Assign enablement owners by team or role
- 4** Schedule short feature rollouts with milestone-based tracking
- 5** Gather feedback and address gaps post-launch

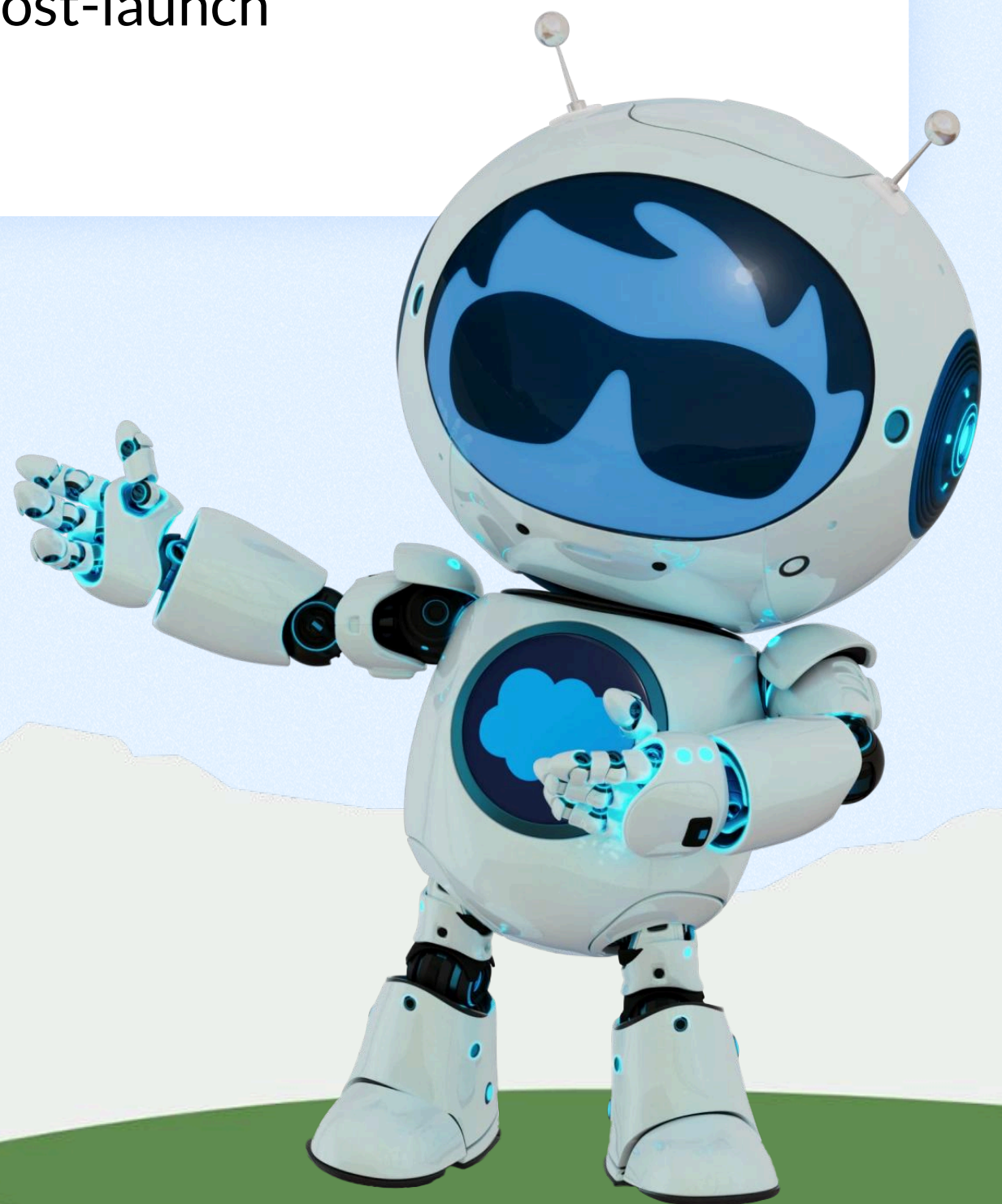


**Pro Tip:** Don't try to enable everything at once. Prioritize features that directly improve workflows or reduce bottlenecks.

# Final Release Weekend Checklist

Use this as your go-live safeguard in the days before and during your production update.

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## What to do next

Once you've worked through this checklist, the next step is clear:

Bring in CUBE84 to validate your readiness, flag risks you may have missed, and turn your Summer '25 rollout into a strategic advantage.

**Book your Summer '25 Readiness Session with CUBE84**

