Multi-Factor Authentication (MFA) Rollout Checklist

This checklist is designed to guide Salesforce Partners through the recommended steps to proactively roll out multi-factor authentication (MFA) to their customers.

* If you’re planning to wait for Salesforce to automatically enable MFA for your customers’ orgs, see the annotations for steps that are still highly recommended or that can be skipped.
* If your customers are responsible for enabling MFA themselves, they can access a customer version of this checklist (as well as change management and onboarding templates) in the [MFA Rollout Pack for Admins](https://security.salesforce.com/mfa-rollout-pack). You can also direct them to the [Multi-Factor Authentication for Salesforce site](https://security.salesforce.com/mfa), where they can access detailed guidance on how to prepare their users and turn on MFA.

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**Multi-Factor Authentication (MFA) Rollout Checklist**

To help a customer make the move to MFA, figure out how to implement it in a way that works for their business and users. Then design and execute a rollout plan. Use this checklist as a guide.

**Get Ready**

**Learn about MFA**: Discover how MFA protects user accounts from unauthorized access and review the steps for setting up and rolling out MFA.

* See how MFA works and why it’s important to implement ⎯ watch this [short video](https://salesforce.vidyard.com/watch/Zs9r7CyxF6Wu9rfNmMnmFf).
* Be aware of the contractual requirement that’s in effect to enable MFA ⎯ review the [Salesforce MFA FAQ](https://help.salesforce.com/apex/HTViewSolution?urlname=Salesforce-Multi-Factor-Authentication-FAQ).
* Get additional details about the MFA requirement in connection with your partnership with Salesforce ⎯ review the [Salesforce Partner MFA FAQ](https://salesforce.quip.com/6iJTAyb07itL).
* Understand the options for implementing MFA, including supported verification methods ⎯ read this [Quick Start Guide](https://www.salesforce.com/content/dam/web/en_us/www/documents/guides/mfa-quick-admin-guide.pdf).
* Ask questions and get advice from Salesforce and other Salesforce service providers ⎯ join the [**Official: Security & Privacy** group in the Salesforce Partner Community](https://partners.salesforce.com/_ui/core/chatter/groups/GroupProfilePage?g=0F94V000000DTtA).

**Evaluate MFA Options and Requirements**: Assess existing authentication systems, business requirements, and org readiness.

* [Review your customer’s current authentication solutions](https://help.salesforce.com/articleView?id=sf.mfa_review_current_solutions.htm) to understand how their users currently access their org.
* [Evaluate which MFA verification methods](https://help.salesforce.com/articleView?id=sf.mfa_evaluate_requirements.htm) meet your customer’s business and user requirements.
* Do you share customer-provided licenses to perform administrative services in your customer’s org? Review [How to Satisfy the MFA Requirement for the Partner Admin Shared Login Use Case](https://help.salesforce.com/s/articleView?id=000388982&type=1).
* [Inventory your customer’s user base](https://help.salesforce.com/articleView?id=sf.mfa_inventory_users_parent.htm) to identify privileged users (your top priority if you roll out MFA in phases).
* [Make the case for MFA](https://help.salesforce.com/articleView?id=sf.mfa_make_the_case.htm) to your customers’ key leaders and stakeholders.

**Plan Your MFA Rollout**: Create a project plan that covers how and when to roll out MFA to your customer’s users, the change management strategies that you need, and how to handle ongoing support and operations.

* [Define a rollout strategy](https://help.salesforce.com/articleView?id=sf.mfa_define_rollout_strategy.htm).
* [Determine a change management strategy](https://help.salesforce.com/articleView?id=sf.mfa_determine_change_management.htm).
* [Establish a support plan](https://help.salesforce.com/articleView?id=sf.mfa_establish_support_plan.htm).
* [Define an implementation and test plan](https://help.salesforce.com/articleView?id=sf.mfa_define_implementation_plan.htm).

**Roll Out**

**Prepare Users for MFA**: Engage and educate everyone about the coming change.

* [Kick off change management activities](https://help.salesforce.com/articleView?id=sf.mfa_prepare_users.htm).

**Implement MFA**: Carry out your implementation and test plan, including setting up a support team to assist users. Acquire, test, and distribute verification methods to users.

* [Prepare a support team](https://help.salesforce.com/articleView?id=sf.mfa_prepare_help_desk_parent.htm) to respond to issues, including helping users recover access.
* [Implement your solution to the partner admin shared login use case](https://help.salesforce.com/s/articleView?id=000388982&type=1), if applicable.
* [Test the MFA implementation](https://help.salesforce.com/articleView?id=sf.mfa_test.htm) to confirm that registering and logging in with each supported verification method works as expected.
* [Distribute verification methods](https://help.salesforce.com/articleView?id=sf.mfa_distribute_verification_methods.htm) and onboarding help to users.
* [Waive MFA for the subset of user types that aren’t contractually required to use it but must be manually excluded from being affected when MFA is enabled](https://help.salesforce.com/s/articleView?id=sf.security_mfa_exclude_exempt_users.htm) (such as test automation tools or Robotic Process Automation systems).

**Launch**: Turn on MFA and kick off launch day activities to support users.

* [Enable MFA](https://help.salesforce.com/s/articleView?id=sf.security_mfa_overview.htm) for direct logins to your customer’s org.
* [Support users with launch day activities](https://help.salesforce.com/articleView?id=sf.mfa_launch_day_activities.htm).

**Manage**

**Measure the Success of the Rollout**: Verify that users are adopting MFA and getting the support they need.

* [Collect and evaluate user feedback](https://help.salesforce.com/articleView?id=sf.mfa_collect_user_feedback.htm).
* [Monitor and analyze login metrics and MFA usage](https://help.salesforce.com/articleView?id=sf.mfa_monitor_usage.htm).

**Support Users and Ongoing Operations**: Work with your support team to help users resolve authentication issues and onboard new employees to MFA.

* Know how to [help users recover access](https://help.salesforce.com/articleView?id=sf.mfa_support_ongoing_operations.htm) if they lose or forget their verification method(s).

**Optimize Security for Your Customer’s Org**: Periodically review new technologies and opportunities to see if there are enhancements you can apply to MFA and your customer’s broader security strategy.

* [Refine the MFA user experience](https://help.salesforce.com/articleView?id=sf.mfa_refine_experience.htm).
* [Review and enhance your customer’s Salesforce security strategy](https://help.salesforce.com/articleView?id=sf.mfa_enhance_defense_strategy.htm).