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Ten Tips for Success with salesforce.com

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Introduction

After helping thousands of clients implement salesforce.com for their organizations, Astadia has seen that even the best-planned executions cannot anticipate all the subtle ways that a new system will affect a user's job. As an organization puts the theory of CRM into practical application, users and managers find themselves grappling with a new set of challenges focused around efficiency and optimization, such as:

- *How can we improve the accuracy of our forecasting and pipeline activity?*
- *How can we increase visibility to information and foster collaboration across the organization?*
- *How can we gain higher rates of system adoption and usage?*
- *How can we consolidate our enterprise data?*
- *How can we better use automation and workflow?*

To improve efficiency and continue optimization of your salesforce.com system, it is more important than ever to stay in touch with your user community in the months following a salesforce.com rollout. Creating an active dialogue between implementation teams and users enables continuous improvement.

Astadia has pulled together a handful of tips to help boost the performance of your salesforce.com investment.

If you would like assistance or just additional help optimizing salesforce.com at your organization, please contact Astadia at **1-877-7ASTADIA**.

1. Resist the Temptation to Over-Engineer

While salesforce.com contains flexible out-of-the-box functionality that allows for complex scalability, we always suggest to “keep it simple”. Carefully consider whether each customization is really needed.

Often a user describes his needs in terms of how he wants the system to work, rather than the objective that he is trying to achieve, which can lead your implementation team down the path of a custom design when it’s not necessarily warranted. Project managers should always steer conversations towards goals and desires versus functionality, thus allowing the configuration team time to reflect on the best method for reaching the users’ goals. Remember, overly engineered designs intensify the need for training, require additional resources to maintain and support, and increase overall costs of deployment.

Suggestions

- Commence projects with user and executive discovery sessions
- Ask users and executives about their goals
- Have users prioritize their goals
- Whiteboard solutions to solve goals keeping to priorities
- Always look for ways to “give back” to users

Summary

Start simply where you can, adding functionality as needed later. All things being equal, the simplest solution usually tends to be the best one.

2. Load Up the Application with Value

One of the first steps to improving user adoption is to recognize that most users had perfectly good ways of accomplishing their tasks before salesforce.com rolled around. Although their systems may have been *effective*, they may have not been all that *efficient*. The challenge, of course, becomes building value within the application, and showing users how they can benefit from employing those tools.

One of our favorite stories is about a salesperson that we affectionately referred to as the “sticky note king”. A photograph of his office showed hundreds (literally!) of little yellow Post-It notes pasted to every available square inch of desk and wall space. Each note contained the name of a customer, an associated task, and a due date. Our friend even shared that his front pocket contained the stack of sticky notes to do for the day, and his back pocket contained the items he had just completed. Although this salesperson’s time management may have left something to be desired, he consistently ranked in the top 1% of the sales organization. His system was highly effective, but it was certainly not efficient.

Undoubtedly, you have your own version of the “sticky note king” at your organization. So, how do you get such a person to adopt salesforce.com? Answer: Layer in as much value as you can to the application and sell the benefit in terms that are relevant to their roles in the organization and relevant to them personally. For sales, find ways to help them generate more business and put more commissions in their pockets. For customer service, help them find ways to make it easier to solve customer problems and gain the reverence of clients.

Suggestions

- Insert links within the salesforce.com Account record:
 - To Google to simplify information searches about companies
 - To Hoovers or Dun & Bradstreet to access business financials
 - To Mapquest to give your sales teams access to directions and maps at the click of a button
- Upload documents to be accessible by Sales for quickly sending to contacts.
- Create views to organize frequently accessed contacts.

- Create email templates, so that users can quickly send emails to contacts and not have to rewrite frequently used text, such as company introductions and “thank you” emails.

And, yes...the “sticky note king” did replace his Post-It notes with salesforce.com. How did we get him to adopt? He was hooked when we showed him how he could plot all his clients and prospects on a map, so he could make his drive time more efficient. Not only did he begin using the system, he became one of the organization’s biggest evangelists of the application.

Summary

Be ever-vigilant to find new ways of adding value for your users. Load up the application with meaningful content and shortcuts that boost their efficiency.

3. Solicit Feedback from Users Regularly

There is natural project fatigue that comes with the completion of any major technology initiative. Deployment of salesforce.com is no different. After typically working in overdrive to put forth the needed blueprint to deploy their new CRM, internal project teams are ready to get back to supporting their normal work efforts.

In order to boost adoption and productivity, it's time to re-engage resources to begin gathering user feedback and to start up the dialogue for continuous improvement. Assemble cross-functional project teams if you can, or set recurring meetings with functional departments to capture feature requests and process improvement ideas from your user community. Manage their requests like any other disciplined project – with tasks, owners, priorities, and delivery dates. Show consistent delivery against their wish lists, and the user community will reward your company with increased usage of salesforce.com.

Suggestions

- Initially after deployment, hold weekly open sessions (maybe a brown bag lunch) to field how-to questions and suggested changes.
- Quarterly, meet with executives, managers, and users to solicit ideas for process improvement.
- Twice yearly, meet with company executives to ensure that reports and dashboards focus and relate to the strategic objectives of the company
- Reach out to groups that are not utilizing salesforce.com today to look for ways that salesforce.com can help their teams. For example:
 - Marketing: Tracking marketing projects through Campaigns
 - Sales: Enabling quoting with Products
 - Sales Operations: Enable notifications through Workflow
 - Customer Service: Enable Agent Console to improve their productivity

Summary

Consistent delivery of system enhancements that users have requested will make them more likely to use salesforce.com. Assembling cross-functional teams to gather feedback after the deployment will improve adoption today and further gain productivity through continuous system improvements.

4. Maximize Workflow Functionality

Salesforce.com contains dynamic workflow functionality for automating recurring processes. By leveraging workflow automation, your users benefit from greater control over routine activities and elimination of redundant tasks. Workflow automation also can improve your organization's adherence to approval processes.

Suggestions

Ask your users about their recurring work, and look for ways to automate it.

- Create custom rules based on a business event (i.e., the change in a sales stage, a priority change in a case) to notify affected teams such as sales or professional services
- Assign tasks with due dates to specific users or groups
- Create escalation rules when something doesn't happen within a defined time period (i.e., notify a manager)
- Develop multi-step approval processes to automate business processes, such as requests for discounts
- Enable managers to grant approval to their sales teams' requests for special pricing or contract arrangements, directly through email without logging into salesforce.com

Summary

Use workflow functionality to help your users eliminate manual tasks and automate approval processes.

5. Scrutinize Your Pipeline From Multiple Points of View

Pipeline stages help organizations identify the status of sales deals and assists forecasting opportunities through the sales cycle. They also provide insight that can help improve sales performance and expedite customers through the buying process.

If your organization did not have a structured sales process in place during initial salesforce.com implementation, chances are that your sales team took its best guess at crafting appropriate stages for your business. With that in mind, it is a best practice to see how those sales stages are prove out in actuality.

And, even for organizations with a structured sales process, having a discussion about the efficacy of pipeline stages is beneficial. Why? At Astadia, we find that most organizations generally set their sales stages from the perspective of measuring progress against targets. But, there are other ways to harness the power of your sales stages.

We suggest looking at your pipeline stages again from four perspectives:

1. **From the angle of pipeline measurement.** How are salespeople progressing against their quotas or goals? Are they *using* all the stages, or are there some that are superfluous? Can your sales teams tell you the definitions of each stage, and the entry/exit criteria for each stage?
2. **From the angle of forecasting.** Ask yourself how the categories could be adjusted to provide better insight into predicting revenue.
3. **From the angle of sales activities.** Are the right sales activities taking place at each step of the process? How do you monitor sales activities to ensure they happen? What activities could take place to move a prospect to the next stage in your sales cycle?
4. **From the angle of improving sales performance.** What tools or resources do your salespeople need to move a prospect to the next stage in the sales process?

Suggestions

- Create dashboard elements and reports to support each of the four pipeline perspectives.

- In your weekly sales meetings, review and discuss your pipeline using the four pipeline perspectives.
- Consider deploying salesforce.com's **Forecasting** module (<http://www.salesforce.com/products/salesforce-automation/analytics-forecasting/custom-forecasting.jsp>).
- Twice a year, re-evaluate your pipeline stages and the close percentages assigned to each stage.

Summary

Evaluate your sales process stages from a variety of angles to optimize results.

6. Extend the Application to Other Systems

To boost the efficiency of salesforce.com, extend salesforce.com by adding bolt-on applications that broaden functionality or through integration with legacy systems to improve data flow, access and analytics.

Add On Applications

To deliver functionality to your users without having to build it from scratch, browse salesforce.com's application exchange known as [AppExchange](http://www.salesforce.com/appexchange) (<http://www.salesforce.com/appexchange>). This site contains applications that salesforce.com and other developers have created and shared with the rest of the customer community. You'll be able to view, test and install applications that range from simple utilities to full vertical solutions. Not only is the site free to use, many of the applications are free as well. Simply download them to your salesforce.com application, install and test.

Integration & Development

User adoption depends on process efficiency. Yet Astadia has found that even companies with excellent salesforce.com adoption have process inefficiencies where users must look up data in one or more systems to complete a process.

Simply put, users want ready access to data in one seamless solution, regardless of where data or functionality resides. They want to eliminate "silos of information" - - multiple databases that store the same information - - to remove data inconsistencies that cause process errors and that hinder communication. Additionally, users typically want relief from situations that require them to re-key data from one system into another.

So, to boost process efficiency, look for ways to streamline processes and minimize re-entry of data through system integration.

Suggestions

- Rather than inventing, check the wide selection of bolt-on applications on salesforce.com's AppExchange to quickly deliver functionality to your users (<http://www.salesforce.com/appexchange>). For example:
 - Download dashboard utilities to extend your lead and opportunity reporting
 - Locate email and direct mail solutions for your marketing team

- Uncover tools like [Pollzter](https://www.pollzter.com/faqs.htm) (<https://www.pollzter.com/faqs.htm>) to capture survey data and feed it into salesforce.com.
- Explore the idea of using salesforce.com as a platform for your organization. Hear how to do it by replaying the Astadia webcast: [Apex – The Future of Application Consolidation](https://cc.readytalk.com/cc/playback/Playback.do?id=86q27qqq) (<https://cc.readytalk.com/cc/playback/Playback.do?id=86q27qqq>)
- Integrate salesforce.com to your accounting system to pass orders and invoices back to salesforce.com for financial analytics

Summary

Integrate salesforce.com with other systems to optimize efficiency, extend functionality, reduce errors, and improve communication.

7. Lead Your Management Meetings from Salesforce.com

To get the performance you expect from the sales team, managers and executives should use salesforce.com regularly. To increase user adoption, encourage managers to lead their staff meetings from salesforce.com dashboards.

For example, if a sales manager consistently references her dashboard during regular team meetings, her subordinates instantly know what metrics that she evaluates and that she expects to find them in salesforce.com. If she takes the additional step of holding people accountable to keeping the system updated, the message is clear that in order for a deal to count, it needs to be entered into salesforce.com.

In short, have managers show users where they expect to find data and look for ways to ensure compliance.

Suggestions

- During sales meetings:
 - Review weekly activities by salesperson; compare activities by salesperson for best practice ideas
 - Review pipeline or forecasting by salesperson
 - Review period attainment to goals
- During customer service meetings:
 - Review weekly customer interactions by volume and type
 - Review high priority tickets for knowledge sharing
 - Review escalation success and failures
- Regarding company compensation use:
 - Tie compensation payouts to system use
 - Consider using applications like [Xactly](http://www.astadia.com/partner-xactly.aspx) (<http://www.astadia.com/partner-xactly.aspx>) to integrate salesforce.com with your commissioning system.

Summary

Establish a culture that salesforce.com is the system of record. If it's not in salesforce.com, it doesn't count.

8. Leverage the Power of Exception Reporting

Unlike standard reports that present large amounts of data that users must sift through, exception reports focus attention on a small but meaningful set of data – namely, values that fall outside of a pre-determined range of acceptability. Additionally, standard reports merely communicate information, whereas exception reports imply a need for immediate action.

Exception reports are dynamic and powerful tools that can help organizations detect problems early, control costs and improve service. But, their greatest benefit is their ability to monitor transactions without direct human intervention, allowing users to focus their energies on other tasks or priorities.

Suggestions:

Consider creating exception reports for your organization and developing processes or programs to take action on the output. Here are some ideas to get you started:

- Customers within x days or weeks of a contract expiration date
- Cases that have taken more than x hours or days to solve
- Product with inventory levels of less (or more) than x units
- Per-unit costs greater than x dollars
- Shipments with a delivery date of x days past the promised date

Summary

Add exception reports to your reporting arsenal to control costs and to improve service. Create and use them wherever you can.

9. Revisit Training

Both initial and on-going training is often under-planned and under-estimated in technology projects. Even the best companies often plan for initial training needs, but overlook long-term aspects of training that impact the performance and adoption of the system.

Additionally, Astadia has found that during technology rollouts, companies typically aim training towards their standard user groups such as sales representatives and customer service associates. For other user profiles like managers or system administrators, training may be left out. Don't forget these key users. Create training programs for these groups as well.

To boost your salesforce.com efficiency, it is essential to revisit the fundamental training questions:

- *Who needs to be trained?*
- *What is the goal for each of the various training classes?*
- *How often should the user be trained to ensure efficacy?*

For many organizations, training occurs only at launch with no further recurrence. This becomes problematic for any group, but more so for groups like sales teams and call centers that tend to have significant annual turnover.

The retention of information during initial training is also an issue. Studies suggest that only a fraction of material presented at a training course is absorbed in the first sitting. Repetition - - even of salesforce.com basics - - is critical for understanding and adoption.

Suggestions

- Think about the needs of your management team. They need more intensive training on report creation and dashboard management than they may have received during initial implementation.
- Don't forget the needs of your salesforce.com administrators and your power users who typically need much deeper technical training, as well as more frequent training to keep pace with the releases of new functionality that salesforce.com delivers regularly.

- Analyze your turnover rates and compare how your training frequency stacks up.
- Remember to watch for changing business dynamics that could change training curriculum or mandate new training.
- Think about adding a salesforce.com training module to your organization's new hire orientation program.

Summary

Break up and tailor your training content and frequency to user's requirements.

10. Offer Self-Service Support

Astadia finds that many companies underestimate their users' desires to "self-serve" when it comes to support and training. From the user's perspective, frequently the quickest path to solving a problem is through first hand research. However, far too often, resources are not accessible (or they are insufficient) for solving common problems. So, think about what tools or resources you could make directly available to your user groups to accelerate their access to support and training information. Enable them to become as self-sufficient as possible.

Suggestions

- Tools such as [ReadyCoach](http://www.astadia.com/downloads.aspx) (<http://www.astadia.com/downloads.aspx>) allow customized, pre-recorded "how to" presentations to be placed within salesforce.com.
- Consider deploying the [Solutions](http://www.salesforce.com/products/service-support/service_processes/knowledge-management.jsp) object within salesforce.com to facilitate the creation of a knowledge base for your user community (http://www.salesforce.com/products/service-support/service_processes/knowledge-management.jsp).
- Consider recording your training sessions as webcasts or podcasts and posting them in salesforce.com for anytime access.

Summary

Explore resources to extend the self-help aspects of your training program.

11. Engage Astadia

Although the title of this document is “Ten Tips for Success with Salesforce.com”, we couldn’t resist the chance for an opportunistic sales pitch!

Astadia is a management consulting and on-demand technology solutions firm that helps organizations:

- **Optimize** salesforce.com with additional training, configuration enhancements, etc.
- **Consolidate** multiple instances of salesforce.com
- **Extend** salesforce.com within your organization by developing additional functionality
- **Integrate** salesforce.com with other applications

With 22 offices coast-to-coast, and now in Europe, Astadia has a consultant close to you for complete support.

For more information about any of the tips in this document, or for more ideas on how Astadia can assist with optimizing salesforce.com for your organization, **call 1-877-7ASTADIA** or contact us at:

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About Astadia

Astadia is a multi-national management consulting and on-demand technology solutions firm that helps organizations become more productive in sales, marketing and customer service. Seasoned with thousands of initiatives, Astadia's consultants provide clients with best practices in sales, marketing and customer service. As a leading on-demand/SaaS consulting firm, Astadia delivers world-class deployments of on-demand technology. Clients span a wide variety of industries and range from small and medium-sized private businesses to publicly traded global enterprises. For more information, visit www.astadia.com or call 1-877-7ASTADIA (877-727-8234).