Top 10 Ways to Get the Most Out of Salesforce

Dan Olsen
Building a cloud-powered business requires more than just giving your people access to new systems. To get the maximum value from an application, you need to understand how your workforce and your business benefit. That’s especially important when the application – like Salesforce – is so central to your bottom line.

LENSONS TO LEVERAGE

According to a major analyst, enterprises that deploy CRM strategies will return at least 25 percent better financial returns than those that don’t. To help you harness Salesforce’s full potential, we’ve developed our top ten list of best practices based on talking and working with clients.

#10 Make the Home Page a “One Stop Shop”

Keep it simple and easy to use. Put important links, commonly used information and dashboards on the initial screen to help drive adoption. Even the greatest software is no good if no one uses it.

After conducting interviews at a client in the entertainment vertical, we defined a list of items to put on the Salesforce home page. We then delivered custom links to portals, using single sign-on to provide users with one-click access to information outside of Salesforce including:

- User-customizable news feed
- Analytics (Visualforce embedded)
- Marketing Calendar
- Upcoming training

#9 Foster collaboration by using Salesforce.com social tools

Encourage the use of Chatter to crowd source ideas and solutions. Its searchable feed allows you to capture valuable knowledge. If someone doesn’t know who the correct person to contact is, it’s likely someone on Chatter will. One secret to driving use is to make sure C-level executives are on Chatter – everyone will want to listen in to make sure they aren’t missing anything.

Wave6 and our parent company, Emtec, use Salesforce and we leverage Chatter to keep our consultants connected! When a customer has a tough challenge and we need answers quickly, we use Chatter to ask the question across our organization, and use our collective experience to provide the best answer. And, we all get to benefit from seeing the answer.

Chatter also eliminates endless email chains of “reply all” that can be hard to follow.
#8 Support a multi-device mobile strategy
Promote productivity by making the information users need available when and where they need it. Recent surveys indicate 65% of workers say their mobile device is their most critical device – a significant increase over 13% who said so in 2011. Mobile ensures you’re getting key info into their hands.

Salesforce Mobile gives users access to their SFDC information with or without wireless coverage. At Salesforce.com, most reps travel exclusively with iPads, leaving their laptops at the home office.

You can update your opportunities, check on activities and, when using Salesforce mobile to call a contact, your phone will automatically prompt you to “Log the Call”. No matter where you are, SFDC is at your fingertips.

#7 Implement a user adoption & training strategy
Keep users engaged and adoption up with regular training. It also promotes standardized processes that mean everyone is using the tool the same way. That makes it easy for new hires to ramp up and begin being productive. Your ROI will benefit.

Working with Edmentum’s CRM Team, we helped develop a training strategy and materials that allows new employees to be effective on day one. We recommended Plato have a process to review and update the training material and ensure it’s available as part of onboarding.

#6 Strive for continuous improvement
Remember as your business evolves, so too should how you use Salesforce. Set up periodic assessments to re-examine and realign the application with your business strategy. Keeping the application fresh can help reduce maintenance costs.

At one client, we started by developing a group of power users from each area of business. The group meets quarterly to document and share needs within the business, gaps in knowledge and suggestions for improvement in the system.

The system administrator reviews and communicates key opportunities and changes related to the most recent release at these meetings and new projects are aligned with the help of this group and leadership. At a minimum, minor improvements or trainings are being introduced on a quarterly basis.

With Chatter, administrators also implement a fairly frequent newsletter or “Chat” offering best practices, new ideas, voting for next enhancements or new functionality. Making improvements to the system and making the user’s part of the changes provides your organization with solid user adoption and business growth.
#5 Audit your Salesforce.com organization against new functionality

Check your installation when new releases occur. New functionality reduces the need for customizations and accelerates potential improvements. Again, keeping the application up-to-date reduces maintenance.

The addition of roll-up summary fields was big for many of our clients because it allowed information from related lists to be summed up on the master record. For example, we could create a field on the Account that rolled-up all the invoice amounts for a particular year for a client. Dashboard filters is another example of a little change that made a big impact. It allowed clients to immediately reduce the number of dashboards. A cleaner look meant users could see what was really important.

You should also clean-up your unused fields and reports. There’s a free app exchange tool called “Field Trip” that reports on field usage. This allows you to see where clean-up in your system can be made and identify gaps for training.

Salesforce provides three releases a year with new updates. You can find out the release schedule at “trust.salesforce.com”. Many of the changes come from the “Ideas” community where users share and vote on the best ideas for enhancements to SFDC. https://success.salesforce.com/ideaHome

#4 Use automation capabilities to reduce manual effort

Save time and allow users to focus on activities that matter most. Automating workflows or tasks like approvals allows you to establish consistent processes. Eliminating manual data entry reduces costly errors.

At Plato Learning, we automated the creation of a Renewal Opportunity whenever they closed an Opportunity. This helped bridge a gap in the process since those responsible for driving Renewals were on a different team than those closing new business. Now Plato has an auto-generated pipeline they could track for renewals, a huge part of their business. Sales Management now has an accurate view of the Renewal pipeline they didn’t before.
#3 Bring other functional groups onto the platform

Improve collaboration between related groups (like sales and customer service) who can share the same data. Eliminate redundant software systems or reduce maintenance costs.

Medica, a non-profit corporation that provides health insurance products, has continued to streamline their sales and installation process gradually. SFDC started small with just the Sales team and has grown to include Account Management who partners with Sales on a daily basis; Underwriting who plays a key role in the sales process; the Product team who provides up-to-date information to keep the Sales team competitive; and most recently the Installation team. Besides creating one place for everyone to manage their business needs, this allows for stronger collaboration between the teams, robust reporting and analysis of the sales process.

#2 Enrich and Improve Your Data

Increase user confidence in the system by removing duplicate data and reducing reporting issues. Augmenting data can lead to identifying new opportunities.

We’ve seen many clients port over data from multiple systems in their initial implementation, with the understanding they’ll have lots of duplicates. They say they’ll get to cleaning up data later – which rarely happens. Failing to take care of duplicate data can lead to major issues. Removing duplicate opportunity records can prevent an inflated sales pipeline. More importantly, it can reduce forecasting errors. If you’re tied into your order management system, that could lead to manufacturing more or less product than you actually need.

#1 Integrate Salesforce.com with key systems

Tie systems together and extend the value of your data. Improve end-to-end processes and reduce errors by eliminating manual data sharing. Seamlessly provide users with key organizational data regardless of system-of-origin.

You can push your ERP data (like order history) directly onto your sales team’s mobile devices, making customer calls more effective. Another benefit of formally integrating your systems is to reduce or eliminate the chance of people manually importing data into Salesforce. You maintain control over the quality of the data.
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Foster collaboration by using Salesforce social tools

Looking for suggestions on how to get started with each best practice? Check out this 30-minute webcast from our parent company, Emtec.
AUTHOR

Dan Olsen leads the Detroit, MI office of Wave6. In addition to a two-decade history developing and managing technology in the automotive sector, Dan has spent the last ten years working specifically in the field of Customer Relationship Management – including time with Model Metrics, now owned by salesforce.com.

Dan is an expert with the Force.com platform, including Sales Cloud, Service Cloud, Chatter and system integrations. He has a strong record of translating complex business processes and requirements into CRM solutions that solve problems and delight clients.

He earned a Bachelor of Business Administration with a minor in Industrial Technology from Baker College.

In his spare time, Dan enjoys playing blues harmonica, mountain biking, gourmet cooking and playing chess.

ABOUT US

Wave6 leverages Salesforce Sales, Service, Marketing Clouds and Communities to transform our clients’ business. Our services Include Salesforce Optimizations, Salesforce Expansion and Implementation, Salesforce Managed Services, Force.com & Mobile Development, CRM Consolidation, and Cloud Application Integration. For more information, visit www.wave6.com.

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