SHIFTING
FORWARD

OPTIMIZING SALESFORCE FROM THE TOP DOWNWARD

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INTRODUCTION

Although hundreds of CRMs exist, Salesforce is often regarded as the cream of the crop. Salesforce.com's solutions exceed conventional definitions of what makes strong CRM software. A healthy blend of analytics, programming platforms, customizable social communities and a plethora of other applications can be synchronized to create a comprehensive deployment comprised of everything modern organizations require. However, Salesforce CRM's best-in-class features don't come at a cheap price.

SALES CLOUD IS OFFERED IN FOUR VERSIONS:

Group:

Comprised of rudimentary sales and marketing features, offered to five users for $25 a month per user.

Professional:

A complete CRM solution priced at $65 per user, per month, available for teams of any size.

Enterprise:

An incredibly customizable CRM program, which costs $125 per user, per month.

Unlimited:

This deployment is not only moldable, but receives unhindered support at $250 per user, per month.

One thing is for sure: It's not a cheap solution. Although a company paying for the Enterprise service may have access to history tracking, automated workflow approval tools and other applications, that doesn't mean it's getting full value out of the deployment.

AN UNFAVORABLE SITUATION

It's a scenario we at Shift encounter all too often – an enterprise purchases a Salesforce package with no clear understanding of how to integrate their unique business processes to fully exercise the CRM solution's capabilities.

To gain a better understanding of how we approach such a situation, consider the following hypothetical example. A digital content delivery company, named CyberAssess, with 45 sales, marketing, and operations employees purchases the Enterprise Sales Cloud package. Prior to implementation the company encountered the following difficulties:

- Employees continued to use email and spreadsheets to manage their complex variables across departments, resulting in a fragmented process and creating friction.
- Sales and marketing teams lacked end-to-end campaign visibility and coordination, causing CyberAssess to miss profitable opportunities.
- Why did these problems transpire? Accessory considerations aside, they were likely caused by a lack of understanding. This isn't to say the company's management was inept. Rather, the issue lies in how the Salesforce solution was approached: It was regarded as simply another piece of software, as opposed to a key component in inciting operational transformation.

THE SHIFT METHOD

Shift is cognizant of the fact that all operations, processes and decisions are dictated to the professionals leading the show. In order to ensure a client's Salesforce deployment need only be tailored once, our team follows a five part process: Scope, Design, Prototype, Refine, and Implement.

SCOPE

Therefore, Shift's team employs soft skills. Before configuration, software integration, or custom development can commence, a holistic understanding of the client's needs must be clearly defined. The goal is to deduce which transformations the business requires and identify how Salesforce can support those changes. From an operational perspective, no one is better acquainted with these requirements than sales and marketing team leaders. Shift CRM President Jonathon Millman outlined two primary questions Shift's Salesforce certified consultants would ask the hypothetical CyberAssess executives, directors and mid-level managers:

1) Why? This involves scrutinizing the company's needs and goals. The digital media company wants to foster better connections between the marketing, sales, and operations teams, leveraging the ability to track ad sales and schedules in a single system and enable the sales team to communicate any campaign changes to the operations team.

2) How can processes be manipulated to optimize operations? Shift deduces that CyberAssess requires a single integrated media management solution that automates key process, supports cross-team collaboration, and provides total visibility from lead through insertion order to revenue recognition. The digital media company's mission to improve visibility and gain control over the media management process requires a powerful accelerator to enrich Salesforce to manage complex client relationships, product pipelines, insertion processes and internal coordination. For example, if managers could review campaign performance and adjust upcoming activity to ensure campaigns run in full, CyberAssess could identify when money was being left on the table and drive revenue.
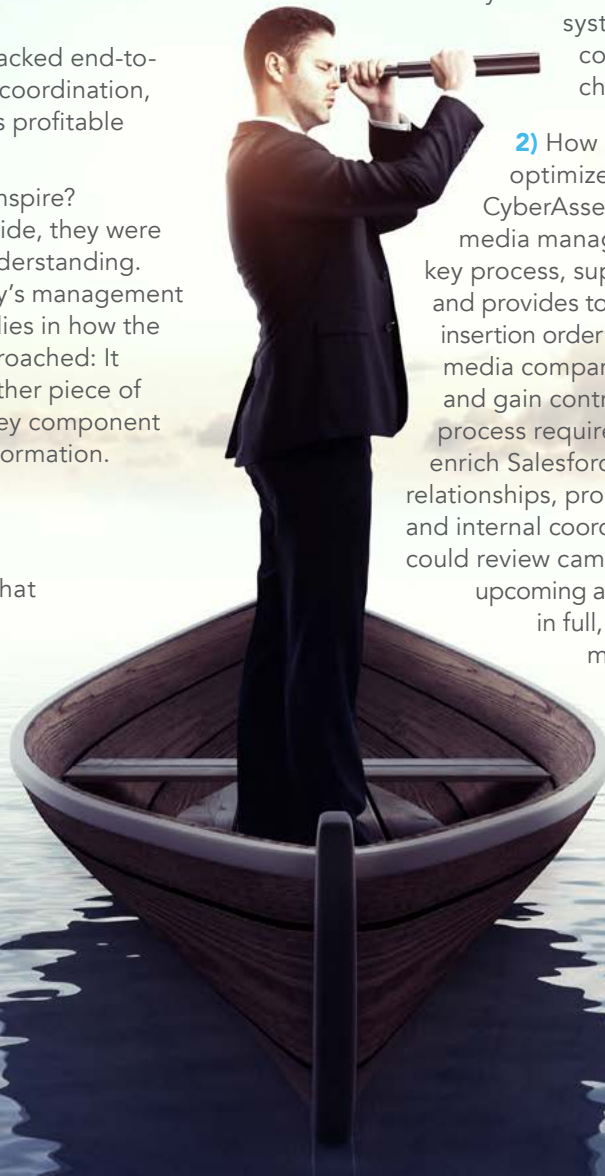
DESIGN

After the above questions are answered, the Shift team creates a game plan detailing what the applications, tools and features the client's customized Salesforce deployment would possess. In regard to CyberAssess's operational objectives, the implementation plan would read as follows:

Build and integrate a single media management system that:

1) Schedules out the monthly forecast amount

2) In real-time automates tracking of actuals against monthly forecast

3) Standardizes referenceable rate card information and embeds it into the system

4) Automates the calculation of the total price for a range of rate card types

5) Enables the sales team to communicate campaign changes to the ad ops team in real-time

PROTOTYPE

Prior to finalizing the configuration or development process, Shift prototypes the custom solution. At this point the client can see exactly how the application looks and functions. This test drive allows for initial feedback at an earlier stage. Not only does this process give clients a greater degree of comfort and control, it also reduces overall project costs significantly.

REFINE

It's essential to get every detail of the functionality and user experience right before the client's solution goes live. Shift's consultants build in regular checkpoints with project leads and the key decision makers to ensure the prototype meets the expectations for usability, functionality, integration, and alignment with the business goals.

IMPLEMENT, TRAIN AND SUPPORT

This final part of the Shift solution consists of providing thorough instruction to management and end-users. Although the client's leaders are kept in the loop through every phase of the process, implementation is where directors and their subordinates receive hands-on experience with the software.

However, Shift's consultants do more than simply train users with the tools. Alongside the client's management, Shift details how the tailored Salesforce deployment will transform the business's operational functionality.

Take CyberAssess's operations team for example. They can schedule the monthly forecast amount, track actuals against the monthly forecast amount, standardize pricing with a new rate card system, and automate the calculation of the total price for a range of ad rate times. This delivers the digital media company a new level of visibility, efficiency, and control to the operations team than was previously possible. They are no longer the team who operated in a silo on opaque systems; they improve campaign delivery and profitability.

What's our ultimate goal? To create solutions that meet the clients' specific needs. The point of purchasing and customizing software is to optimize workflow, and that's exactly what Shift intends to do. The objective isn't to install applications that will go unused, but to create a holistic deployment that enhances day-to-day processes.

About Shift

Shift is a Salesforce Silver Cloud Alliance Partner with more than 150 years of combined experience implementing, configuring, and re-envisioning the world's #1 sales and service platform. We also offer a range of off-the-shelf technology solutions designed to enhance and extend Salesforce functionality for small businesses and Fortune 500 organizations in specialized industries including technology, manufacturing, media and communications, healthcare, the nonprofit sector, and professional services. Headquartered in Toronto, Canada, with a local presence in Ottawa, Vancouver and New York, we provide both remote and onsite service to a global client list.

Toronto Office | 416-635-1300
155 Gordon Baker Road, Suite 302
Toronto, ON, Canada M2H 3N5

Vancouver Office | 604-942-6322
3030 Lincoln Avenue, Unit 211
Coquitlam, BC, Canada V3B 6B4

info@shift-crm.com
www.shiftcrm.com
@ShiftCrm

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