The Salesforce Sales Cloud Top Five

Appdraft's Top Five tips for making the most of Salesforce Sales Cloud!

Introduction

The purpose this paper is to outline what we consider to be the Top Five features of Salesforce Sales Cloud; the features that no Sales Cloud instance should be without (or at least should go without considering!).

So, if you've already implemented Salesforce or you're thinking about it, this guide is for you.

Automation

First up is Automation. The average Salesperson spends just 34% of their time selling. Whilst that might not sound like a lot, it might not be surprising when you think about how much time salespeople spend doing admin.

Sales Cloud aims to help reduce this with automation by automatically creating or updating records that would otherwise be created manually by salespeople.

Automation workflows are configured in the Process Builder and there's a lot of flexibility; allowing you to update or create new records automatically based on changes to other records and time triggers.

For example, you can configure the system to create call reminder tasks when a new priority leads are created, or set alerts when the close date for opportunities is extended by more than seven days.

You can even kick off approval processes for proposed discounts on deals. You can automate approvals if the deal meets certain criteria and, if the approval needs manual intervention, you can automate the request process and keep the replies all within Salesforce; no more relying on emails, hoping people read them and chasing up responses!

We help businesses spot opportunities to automate and identify these as part of collating user stories.

If your team are regularly creating certain types of records or are always updating fields in a predictable way, then this work could be more efficiently done using automation in Process Builder.

What we're looking for when we identify opportunities for automation are 'marginal gains'.

The average Salesperson spends just 34% of their time selling

In isolation, creating and updating records doesn't take long, but if your team are all doing it on a regular basis, the cumulative efficiencies of automating this admin work will really start to add up.

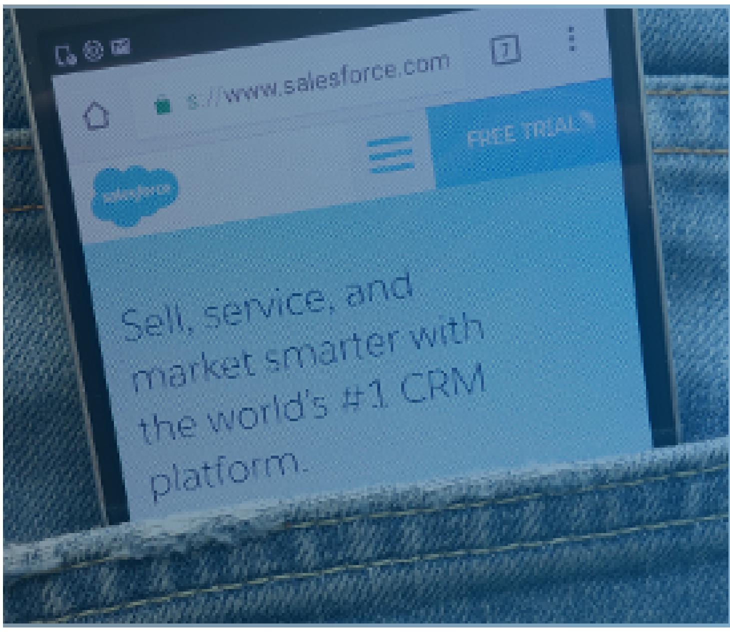
The other benefit, of course, is that automation always does things right; it doesn't forget or plan to do things later.

The more you automate, the more time your team can win back to start doing more sales.

The more you automate, the more your team will start to realise the benefits of CRM, instead of seeing it as an admin chore, it'll start to become a helpful tool that saves your team time.

Mobile User Experience

One of the great things about Salesforce is that it's mobile ready. Everything you configure for desktop can be converted into a mobile experience.



Users can create leads when they're out in the field or at events. There's no longer any need to wait until you get back to the office; you can start to do admin like this in downtime or when travelling to and from events or meetings.

Users can update Salesforce straight after meetings, when the details of what's been discussed are still fresh in the memory.

It’s even possible to access reports and dashboards on the go; so you’ll always have an answer when questions about the pipeline crop up in meetings. All the MI you need can be live and at your fingertips.

It’s even possible to configure buttons for frequently used features like pricing or discount approval processes; which means there’s no need to wait until you get back to the office to ask the questions that you need to ask to move Opportunities forward.

'Low code’ is a method of developing software or applications that keep the writing of specific code to a minimum.

On low code platforms, the majority of applications can be developed ‘declaratively’ by configuring options on the platform rather than writing code. The advantage of this is that it takes less time and is less expensive to develop functionality.

A good user experience can be key to increasing user adoption. The success or failure of a CRM system is always down to user adoption. If your team don’t see the value in it, you’ll spend all your time using carrots and sticks to try and get them to use the system. Whereas, if it saves your team time, it adds real value and and it’s easy to use your team will naturally gravitate towards it and your system will be the author of its own success.

Automating the Proposal and Contract Process

The experience a potential client gets when trying to buy your product or service says a lot about your business.

If you’re slow to produce proposal documents, prospects can lose interest and faith in your ability to treat them as a priority. Whereas, if you can hold their hand through the process of hammering out the detail at the proposal and contract stage, they’ll thank you for it and you’ll be able to start working for them and billing quicker.

Salesforce can speed up the proposal process by generating .pdf proposals, based on products or services selected from a version controlled price book; so you’ll never quote the wrong price or sell a product or service that you can’t deliver.

You can design your own templates, so there’s no need for your team to spend time editing word documents or getting proposals approved.

Once generated, proposals can be sent to the prospect by email. If the Quote needs to change, you can just update it, re-sync it with the opportunity and the opportunity revenue will recalculate.

When moving to contract, you can save time again with templates. It's best to use a document generation bolt-on app for this.

There are plenty of options to choose from and some that work really well. Once you've generated a standard contract, pulling in all the fields from the system and the quote that you need, you can send it to the prospect using optional digital signature applications.

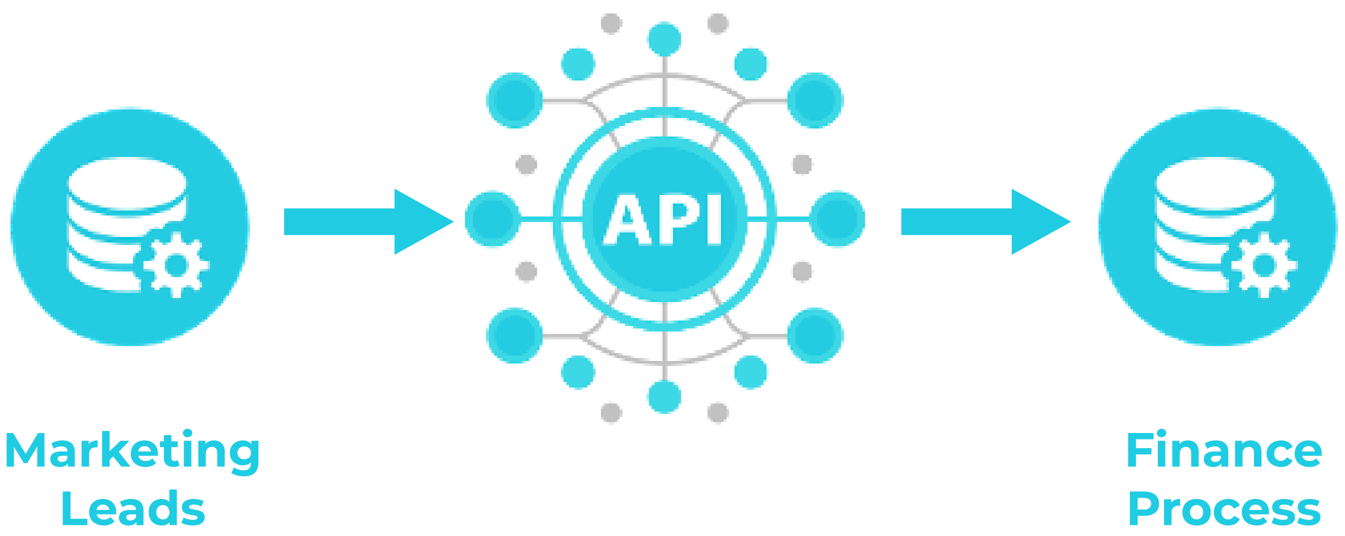
Speeding up the contract execution process allows business to start supply goods and services immediately, instead of waiting days for contract counterparts to arrive by post.

It makes you look good, starts the client relationship off on the right foot and means you close deals faster.

Integrations and Data Exchange

Salesforce is very much an 'open' platform. It's designed to integrate easily with other software and to allow users to pull and push data from other platforms. Salesforce has modern Application Programming Interfaces or APIs that allow it to integrate with external systems. Typical uses might be to pull leads from marketing software into Salesforce or to push confirmed sales into an invoicing or finance platform.

If you don't want to configure APIs or your external systems aren't smart enough to support live data exchange, you can use Salesforce extensions to schedule the import and export of data at intervals to suit your requirements.



Salesforce users also benefit from the AppExchange. The AppExchange is an app store for Salesforce that has over 5,000 free and paid applications that you can bolt on to your Salesforce system.

There are applications and integrations for some of the most widely used business applications. AppExchange makes it easy to extend the functionality of your system, without needing to develop or configure your own API's.

The open nature of Sales Cloud means it works well for businesses that are starting to think about digital transformation.

It's worth noting that the Salesforce Platform can be used to build just about any type of business application. Many businesses that start with a Salesforce system like Sales Cloud or Service Cloud will start to build out from there; migrating their business critical applications to the Salesforce platform so that they can benefit from features like increased data security or better integration capabilities.

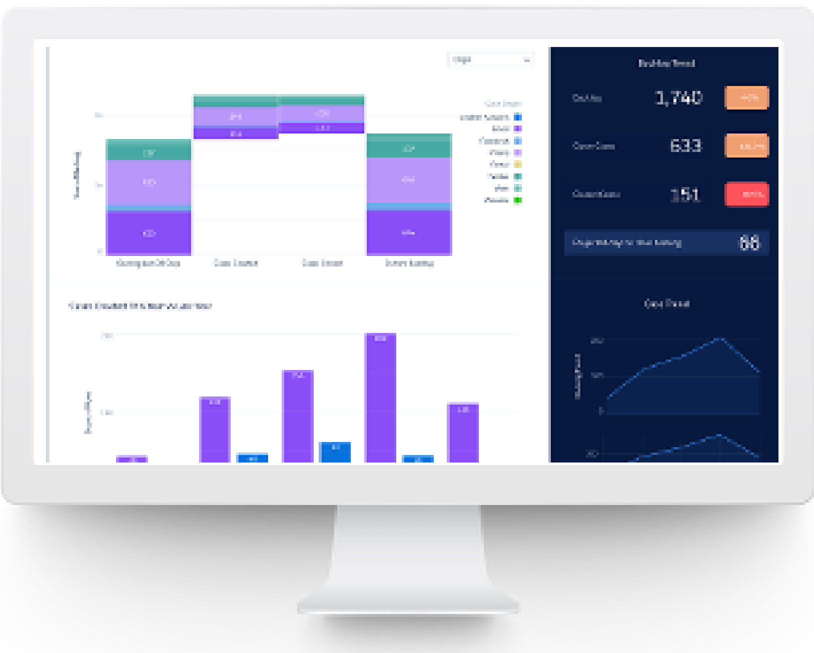
Reports Dashboards and Forecasts

Management Information is where Salesforce adds real value. One of the key outcomes for any business implementing CRM is to help them get better information about their pipeline.

That said, it's not uncommon for businesses to avoid configuring Salesforce reports and dashboards and to rely on exporting data from the system into spreadsheets.

The issue with this, of course, is that data that gets exported to a spreadsheet is static; if you're only exporting it once a month that means you and your team only have the right answers once a month. Within hours, that spreadsheet that you've spent hours configuring is out of date!

Although it might look complex, designing reports and dashboards in Salesforce is one of those 'fire and forget' things. Do it once and it will be there forever; you can just click refresh every time you need answers.



No exporting data, no messing around with spreadsheets, just live, insightful MI that you can share with your team or whoever you need to, whenever you need to.

You can get data on lead conversion rates, opportunity pipelines and anything else you need.

You can filter the data in the templates by team or service line; using whatever lens you need to look at the data. You can produce Forecasts with team Quotas to keep track of performance. Managers can produce overviews or corrections to forecasts before they are more widely shared with the business.

The next step is using Salesforce Einstein analytics to provide AI-based insights; including scoring leads by likelihood of conversion, identifying which deals are likely to close and identifying opportunities to upsell to existing clients.

Getting MI right is really important. There are usually a few KPIs that businesses want or need to track. It might be revenue or EBITDA or units sold.

Whatever the measures are, once they've been identified, configuring the reports is easy and keeping track of performance is then as simple as clicking a button.

Conclusion

Sales Cloud is a uniquely configurable product, which is one of the reasons why it's the worlds number one CRM system. But with great configurability comes great responsibility(!) and often businesses will subscribe to Sales Cloud with great intentions, only to end up using it simply as a database to track clients and deals.

If you don't take the time to configure the system and make the most of it, your users won't see the value in it.

If your users don't see the value in it, they won't update it properly. Soon it becomes an expensive white elephant that does nothing for your business.

With time, CRM systems have a habit of becoming unwieldy and overgrown. As users add more and more duplicate fields or change the way they structure data it can become difficult to make sense of the system and user adoption drops.

If you think you might be in that position, it could be time to realign your CRM with the business needs and make sure you're making the most from it.

With a little bit of thought, design and configuration you can produce a system that your team will benefit from; a system that they will **want** to use.

It'll save them time and give you the answers you need. It'll also give you a better understanding of your clients; what they've bought what they haven't bought (yet). A well optimised CRM really can provide that 'Holy Grail' 360-degree view of the customer.

Appdraft can help you identify the right features, the features that will add value for your business right now and those that you might want to consider in the future.

For more information, contact info@appdraft.com or visit www.appdraft.com