10 Quick Wins with Salesforce

Tips to get your Salesforce environment working more effectively

Ten Quick Wins To Transform Your Salesforce Application

Do you feel that your business and your Salesforce system are not getting on like they used to? It may be your people, processes or products have changed. Perhaps you can't put your finger on what the specific problem is but you are thinking "We can't trust the data like we used to" or "There are some features that look like they should help but which ones?" or "Our system is bent out of shape".

We run lots of short projects to transform the ROI our customers get from Salesforce. Certain common opportunities for improvement occur time and time again. Here are eleven of them, because like the projects we run, we wanted you to get more than you bargained for.

DOME: Problems associated with Duplication, Omission, Misguided Endeavour, or Error

- Make proper use of the Find duplicates tool.
- Run redundant field reports to find out what fields are not being used, and remove or hide them.
- Find the users who have never been trained or who have only been trained online. Run an intensive refresher briefing session.
- Identify which fields are most prone to error and add validation rules.

Get your Pick Lists right

Many pick lists try to capture information with different attributes for example, mixing lead source with 'How did you hear about us' information. 'Customer type' often mixes nature of business with Size or Industry etc.

Clarifying and simplifying these lists makes the information easier to complete and more reliable.

No more Hidden Activities

Stop using notes or comments fields to capture conversation threads.
Use the Log a Call feature or create another version called Log a Visit. Now you can track and measure who said what to who and when and what the outcome of the call/visit was.

Make it all visible

Discover the wonders of the View All button that will show you all the conversations in order on one screen.
Create a new field called Task outcome or Call summary that you can then show in a related list without having to click a button

Mobile Lite

Get something for nothing! Get everyone who has a Blackberry, iPhone or Windows Mobile Smart Phone to use the FREE version of Salesforce Mobile to give them real time access to your data.

Give your leads a score

Put in a good lead scoring field. Hot, Warm, Cold describes a bath not a lead. Add this field to lead history tracking. Run a report to show which leads need most attention today.

Adoption problems?

Can’t get everyone you’d like to use the system? If you can’t persuade them, bribe them. Build an expense claim and holiday approval application, and remove the paper versions.

Change your outlook

If you are not using Connect for Outlook, please start now. Stop people keeping half their information in Salesforce.com and half in Outlook. There is huge potential to sync the wrong data. Audit the set-up of each user’s sync setting and get them to use the integration correctly.

Which reports?

Many people get stuck and lost in their reports. Hide all the ones that come as standard. Look at what people are using excel to report on. Create reports to eliminate spread sheets.

Use Dashboards to change behaviour:
Create a home page dashboard that shows individual performance versus target for every user and remember to set the refresh to automatic. A daily reminder of how well they are doing.

Much more besides

Make use of email templates, use workflow to automate many manual tasks.
……Stop Press! You do not need to buy Enterprise edition to get workflow……
Use Conga merge to create instant reports across objects, add Skype call to reduce the cost of calling.

We could go on …. But we would prefer to talk to you to and show you how fast you could realise a better ROI from your current Salesforce system.

If you would like to understand the detail and how Xenogenix can make your Salesforce implementation more successful call us on 08456 525 625 or email smart@xenogenix.co.uk.

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