10 Steps to Success with Salesforce

How to ensure your Salesforce implementation is a success

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Implementing Salesforce is fundamentally different from other business system implementation because virtually all of the IT pain is eliminated by the on-demand nature of the application.

However, this is still an application that will change the way that your people do their day to day work and so the hard part of business change initiatives still need to be tackled well to get the huge potential return on your investment.

Here are our ten steps to making sure that your Salesforce.com implementation is successful:

1. **Understand your CRM strategy and objectives**
2. **Launch a formal initiative**
3. **Design the CRM processes**
4. **Plan how the organisation will change**
5. **Agree the Salesforce.com configuration**
6. **Set up your Salesforce.com environment**
7. **Train your people**
8. **Drive adoption to 100%**
9. **Optimise Salesforce.com and the new processes**
10. **Manage people and process performance**

The rest of this paper looks at each step in a little more detail.

1. Understand your CRM strategy and objectives

A CRM strategy typically changes the way the organisation captures and uses information that arises from each interaction with the customer to drive up revenues and contain costs. There is no point in embarking on any project that involves business change unless you are clear about how the outcomes will help deliver your strategic goals.

A CRM strategy typically supports the growth and productivity strategic goals of an organisation. These goals will be achieved by delivering on a range of lower level objectives.

For example the growth goals might be dependent on:

- Customer growth in existing markets
- Customer growth in new markets
- Revenue growth from existing customers
- Revenue growth from new customers

Productivity goals could be dependent on:

- Marketing to lead efficiency
- Lead to order or sales efficiency
- Enquiry and service handling costs, response times
- More accurate demand planning

The problems that are preventing you achieving these objectives will determine the shape and scope of the initiatives to execute the CRM strategy.

You need to have explicit agreement in the business on these problems which become the drivers for change.

They might include:

- Inadequate no of leads per £ spent on campaigns
- Close the marketing loop, i.e. understand which campaigns work best
- Too much time spent on sales administration
- Quote to order takes too long
- Lack of repeat business form existing customers
- Poor management visibility of the opportunity pipeline
- It is hard for everyone to see all of the information on a customer that they are dealing with
- There are too many poorly resolved customer service problems

These drivers all stem from problems with the current way of doing things. Once you are clear about the problems, you can identify the drivers and get people to buy into delivering the performance improvements that the new environment will need to deliver.

2. Launch a formal initiative

So, the business has decided to implement Salesforce and the boss wants to see some "quick wins", so the best thing to do is get stuck in. WRONG! We see so many initiatives that never deliver because they are not properly set up.

A Salesforce implementation needs to be set up as an internal project, with objectives and goals that clearly align to strategy. It needs a plan and a project managed team of people. But most of all, the initiative needs the buy in of the management team to avoid the high risk that someone actively undermines the initiative as other priorities arise.

The good news is that unlike conventional CRM initiatives, a Salesforce initiative can be planned to deliver very quick wins. You can start small and progressively roll out on the strength of early successes. Once the initiative has been properly set up (not before) then you are ready to "crack on".

3. Design the CRM processes

The mantra throughout a successful implementation is "Keep It Simple!" As with so many other things true success feels simple and so it is with processes. The first step here though is to agree what the scope of the new CRM processes is going to be.

Which of these will be included?

- Marketing to Lead
- Lead to Opportunity
- Opportunity to quote
- Quote to Order
- Enquiry to Resolution
- Account Management (Customer to NEW Opportunity)
- Forecasting

Having decided the scope of the implementation, you should first map out how the processes work (or don't work!) today, then map out how they should work in the future. This mapping effort is all about designing the way the business will work once the new application is working and includes the specification for the set up stage.

The outputs of the design step are:

- Process maps that specify what gets done when and by whom
- Information capture and usage requirements at each step in the process
- Business rules for decision points along the process
- Agreed performance management metrics

4. Assess the impact on the organisation

Now you have figured out how the work should be done, ask how the organisations structure or culture or behaviours might need to change. Responsibilities and accountabilities for handling information and making decisions will probably be different. As these become clear, start to plan how and when you will change the organisation.

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5. Agree the Salesforce configuration

Armed with the design information we are ready to configure the application and then confirm that it meets the business needs. This is an essential step to take before releasing the application to the user community. This stage is often iterative as the agreed design may not quite fit the way the business had envisaged it once they see the application working. Typically there are likely to be two or three iterations before the bugs are eliminated so that the users can sign it off.

The sequence is likely to be:

- Configure the application to meet the agreed design
- Run a pilot with the expert users
- Review the results
- Either sign the application off or repeat the three previous steps

You need to know when to stop with this process. There is often the temptation to change the design at this stage and it may be that small changes can be accommodated. However, it is much better to get a 90% solution out on time than have a 95% solution late. It is extremely unlikely that the solution will be 100% until the optimisation stage later on.

Note: Scope creep can often seriously undermine the project and it is in everyone's interest to avoid it like the plague.

6. Set up your Salesforce environment

Before you can train people on the application, you need to make sure that the whole environment is correctly set up. At this stage you have already configured the application, now you need to get it ready for your users.

- User accounts must be set up
- Real data must be migrated from existing systems to Salesforce.com
- Any system integration with existing systems must be completed

Once your environment is fully set up and tested you are ready to train the users.

Note: It is really important that the application is working correctly before you carry out user training as any errors or problems will undermine user confidence and make it much harder to get adoption.

7. Train your people

Every user needs to have some sort of face to face training before you go live with the new application. Otherwise they simply won't have the confidence to use it for real and adoption will suffer. But before you train your people, you need training materials.

Fortunately, Salesforce makes plenty of basic, generic training available online for free. However, by its very nature this material does not exactly reflect your application configuration and it does not show how the application fits into your overall business processes.

So how do you produce good training material quickly? The answer is "by developing the training material as you develop the application".

Training material needs to rapidly communicate three things:

- How the process should work end to end
- What each person in the process needs to do and when, to make the work flow smoothly and quickly through the process
- How to use the application at each step of the process

The process maps developed in step 3 shows how the process should work end to end and the business rules and other information attached to the maps explain who does what and when. With the right tools and techniques you can then rapidly build interactive storyboards that take the reader through the process from the highest level right down to click by click instructions for using your own version of the application.

These materials are used in the user acceptance pilot testing in step 5. The result is a set of end user training materials that are ready to go and tested well before the training has to start.

8. Drive adoption towards 100%

Once the end users are trained you can do the final transfer of existing data into the application and then you are ready to "go live". The transfer to the new system needs to happen as soon as possible after the user training finishes, preferably within a few days.

The challenge now is to get everyone using the application properly. You need to put in place user support which can come in a number of formats:

- Experts on hand at the end of a phone or email who can resolve queries about using the application
- Access to the maps and training materials that were used to deliver the training. These should ideally be available with a single click from the desktop
- Online training materials such as the generic training materials provided by Salesforce
- Tips of the day/week sent to people's in boxes with the latest solutions to people's problems
- Access to a knowledge base of queries and solutions

As well as providing support, it is important to have an incentive for people to use the new application. This is easy in some environments such as customer care where people probably only have access to one way of working. But for sales people it can be very hard to give up on Outlook, Excel, bits of paper and Post It notes! This is where it is down to managers to make sure that their teams are adopting the new ways of working. There are a number of ways of persuading people to change and a combination of carrots and sticks usually works best.

9. Optimise Salesforce.com and the new processes

This step may take a considerable time depending on the size of the organisation and the number of processes being supported by Salesforce.

The purpose of optimisation is to make sure that you get the maximum benefit from your Salesforce implementation. The beauty of Salesforce is that you can be up and running in a very short time. With the best will in the world, it is simply inconceivable that everything about the initial configuration will be perfect. In addition the way you do business will also change from time to time as well.

So optimisation should be seen as an on-going process with the following steps in the optimisation cycle:

- Observe how people really do the work
- Solicit feedback from the users
- Review problems raised by users
- Modify the configuration/set up
- Test the new set up
- Communicate the changes to the users and provide guides if necessary

Clearly optimisation will help to drive 100% adoption and acceptance of the new application and so it will run in parallel with step 8.

10. Manage people and process performance

As with Optimisation, Performance Management is an on-going process and runs in parallel with steps 8 and 9.

Salesforce has a powerful reporting and dashboard capability. As part of the initial configuration, dashboards and reports should be developed that reflect the performance management metrics that were agreed in step 3. It is inevitable that these will need to be modified as part of the optimisation and priority should be given to ensuring that managers get the information at their fingertips that help them manage the users and the process.

It is essential that the performance information is reviewed and acted on regularly otherwise performance will stagnate and start to deteriorate. Process issues should be identified and passed into the optimisation cycle. People issues need to be acted on as part of the day to day management effort. Doing nothing when performance is flagging is simply not an answer!

So there we have it, 10 Steps to Success with Salesforce. As with all methodologies, the devil is in the detail.

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

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