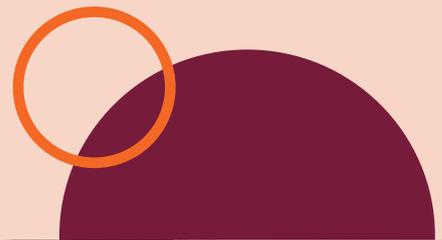


Maximizing the Value of Salesforce



A new scalable, digital approach towards enterprise wide Salesforce adoption and success



The Critical Challenges to Salesforce Implementation Success



For 12 years in a row now, Salesforce has been a leader in Gartner’s Magic Quadrant for CRM, which in itself is the largest software market segment today. That says a lot about how effective Salesforce has been for its 4 million users and hundreds of thousands of customers. Implemented well, Salesforce can deliver a 30% increase in sales revenue and a 26% improvement in sales winrates. Salesforce has helped enterprises like Philips, Toyota, ADP and countless others transform their sales and customer service processes. At the same time, it has also helped companies remove data silos enabling companies obtain a 360 degrees view of their prospects and customers. Salesforce, specifically, is purpose built to deliver results by virtue of its integration capabilities and its ability to be heavily customized. But, quite often, companies don’t actually realize these benefits. Even when they do come close, it takes several months post roll-out, if not years.

But why does it take so long to truly realize the benefits of Salesforce? Implementation experts point to a few major culprits:

- Poor end user adoption of Salesforce resulting in under realization of value.
- Systems integration leading to silos between peripheral systems and Salesforce.
- Poor data quality adversely impacting the ability to obtain deeper business insights.

“User adoption is essential to success, regardless of the size, complexity, or geographic footprint of your rollout.”

- Salesforce

The Manifestation and Costs of Poor Salesforce User Adoption



Unlike the other major challenges, which are technical in nature, poor user adoption of Salesforce is a people-related issue. More often than not, enterprises consider Salesforce deployment and rollout to be the most important success milestones. But, implementation success is never achieved until end users completely adopt Salesforce integrating it into their workflows and processes. Poor user adoption is a manifestation of typical employee resistance, which per se is a common feature of all change projects. Irrespective of why it occurs, poor end user adoption can burden companies with many unforeseen costs. Whatfix research indicates that, for an enterprise with 10 thousand sales users, the following negative are generally felt:

- Low or negative ROI on Salesforce implementation project
- Increasing training and retraining costs crossing \$1million in a year
- Low sales productivity and performance which can cost the company about \$20 million each year.
- High support overhead and resource commitment costing nearly \$2 million each year.
- Lower than anticipated sales efficiency and diminished revenue growth

These are grave yet real, hard costs. When companies implement Salesforce, they want to streamline sales and customer facing processes, which have big dollar values attached to them. But if end users don't adopt Salesforce, companies will never be able to fully achieve these objectives. Enterprises can subtly force employees to use Salesforce or incentivize usage. But, there is no substitute for efficient self-driven adoption.

According to Ebsta, more than 55% users spend at least 3 hours daily on Salesforce. Yet, improving productivity is the top priority for business leaders this year. There is a clear correlation between the two. Salesforce users aren't deriving the value that they ought to. That is why sales reps have explicitly called out CRM systems as their biggest frustration when it should actually be their biggest savior.



Salesforce Implementation Success Checklist



Most commonly, Salesforce implementation success metrics are concentrated around deployment, integrations and rollout. Though challenging, these are tangible and observable parameters and can be tackled with a good implementation partner/team, following the best practices of Salesforce implementation. People related issues, however, need concentrated efforts spread throughout the project lifecycle.

Salesforce implementation teams need to ensure that the following are in place before rollout:

- ✓ Clear and detailed communication of the objectives of Salesforce implementation project and why it's going to be beneficial at the end user level.

- ✓ End user training on how to use Salesforce incrementally while expending as little of their time as possible.
- ✓ Helping end users adopt Salesforce with methods that are personalized to their job roles and responsibilities.
- ✓ Installing a system which can instantly answer end user queries eliminating any lag.
- ✓ Delivering continuous training that helps end users learn throughout their Salesforce usage lifecycle.



Solving the Salesforce Adoption Challenge: Traditional vs Modern Approaches



In case of a Salesforce implementation project, some of the traditional ways of driving Salesforce adoption are not as effective today as they were in the past. This can be attributed to various factors such as the workforce profile and hence preference changes, business agility demands and so on. Such changes warrant the need for a new approach. Compare the traditional, disjointed approach with a modern one using an integrated digital adoption platform.

Traditional Approach

The traditional approach is focused on isolated training. End users are provided theoretical Salesforce training pulling them away from their work processes. In such a training approach, knowledge retention is low. So, when end users actually login to Salesforce, they can't recall all the knowledge and have trouble performing tasks inside Salesforce.

As such, end users have to intermittently request for help. Support, too, takes time arriving causing a productivity dip.

First and second year Salesforce adoption rates are generally low because most enterprises depend on

“Post internal buy-in, only 31% of Salesforce companies reported user adoption of 90 percent.”

- Accenture

the traditional approach of adoption. A lot of them have failed too. The new approach, on the other hand, has seen a higher success rate. This is since it graduates the adoption approach from a classroom driven one to a more digitized and integrated one. Such an approach is also much more aligned with employee expectations and habits.



Digital Adoption: The modern approach to driving Salesforce user adoption

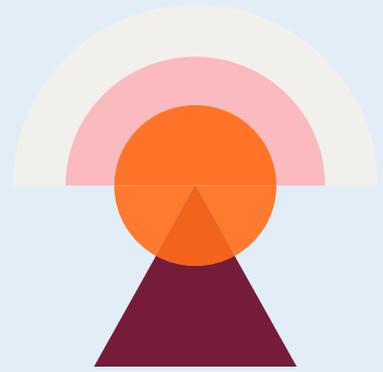


In comparison, a digital adoption approach can help enterprises achieve Salesforce objectives faster than the traditional route. Digital adoption uses non-intrusive methods to continually train Salesforce end users while also providing just-in-time help that sensitive to their context within Salesforce. Knowledge is always embedded within Salesforce empowering end users to learn in the flow of their work. Implementing a digital adoption approach quickly kicks off the following process:

- ✓ **User Segmentation:** Salesforce users can be easily segmented based on their job role, location or department in order to deliver better targeted training.
- ✓ **Onboarding:** Based on their segment, end users can be easily onboarded, walking them through the basic tasks they need to learn to start using Salesforce. Onboarding happens within Salesforce in realtime.
- ✓ **Continuous Training:** End users can be continuously trained in the flow of their work. This helps them execute processes while learning and without having to spend time locked in a classroom.
- ✓ **Just-in-time Help:** Contextual help is always available inapp within Salesforce empowering users to instantly selfserve queries.



Value of Digital Adoption for Salesforce



Using the digital adoption approach for Salesforce can deliver multiple value propositions for enterprises.

On the one hand, enterprises spend lesser resources in producing quality Salesforce training and measuring effectiveness. On the other hand, end users adopt Salesforce faster and achieve higher productivity. Broadly, the modern approach helps companies achieve faster payback and generate higher ROI on their Salesforce ownership cost.

Since digital adoption delivers embedded training and just-in-time help, enterprises realize the following benefits:

- Enterprises witness quicker payback times and higher ROI
- Inexpensive to create and deliver custom Salesforce training content for end users

- Easier to gauge the effectiveness of training programs for Salesforce
- Simpler to update training content upon changes in the Salesforce instance and for release training
- End users learn using Salesforce in the flow of work so they don't have to spend time away from work in training

We saw 50% reduction in training content creation time, and 60% reduction in Salesforce training efforts.

- Trotec Laser

Whatfix Digital Adoption Platform is designed to help enterprises drive their Salesforce user adoption at scale and with speed. Whatfix uses intelligent in-app guidance technology to help enterprises streamline their Salesforce training and support.

Whatfix is a leading Digital Adoption, Guidance and Engagement Platform which empowers organizations to efficiently manage the end-to-end enterprise software adoption lifecycle of their end users. Whatfix helps companies onboard, train and support end users on software applications without any external intervention delivering a seamless product experience. For this, the platform allows companies to create and embed interactive walkthroughs, within any web application, guiding users through every step of a workflow in realtime. By addressing the critical product adoption challenge, Whatfix helps reduce end users' time-to-competence thereby improving their productivity and performance. Whatfix seamlessly fits into the application stack of an organization allowing for rapid deployment on any one or multiple software applications at enterprise scale.

<https://ambition.com/blog/entry/2014-8-21-five-questions-salesforce-ben/>

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