How Your Salesforce Strategy Might be Killing Productivity

(And How to Fix It)
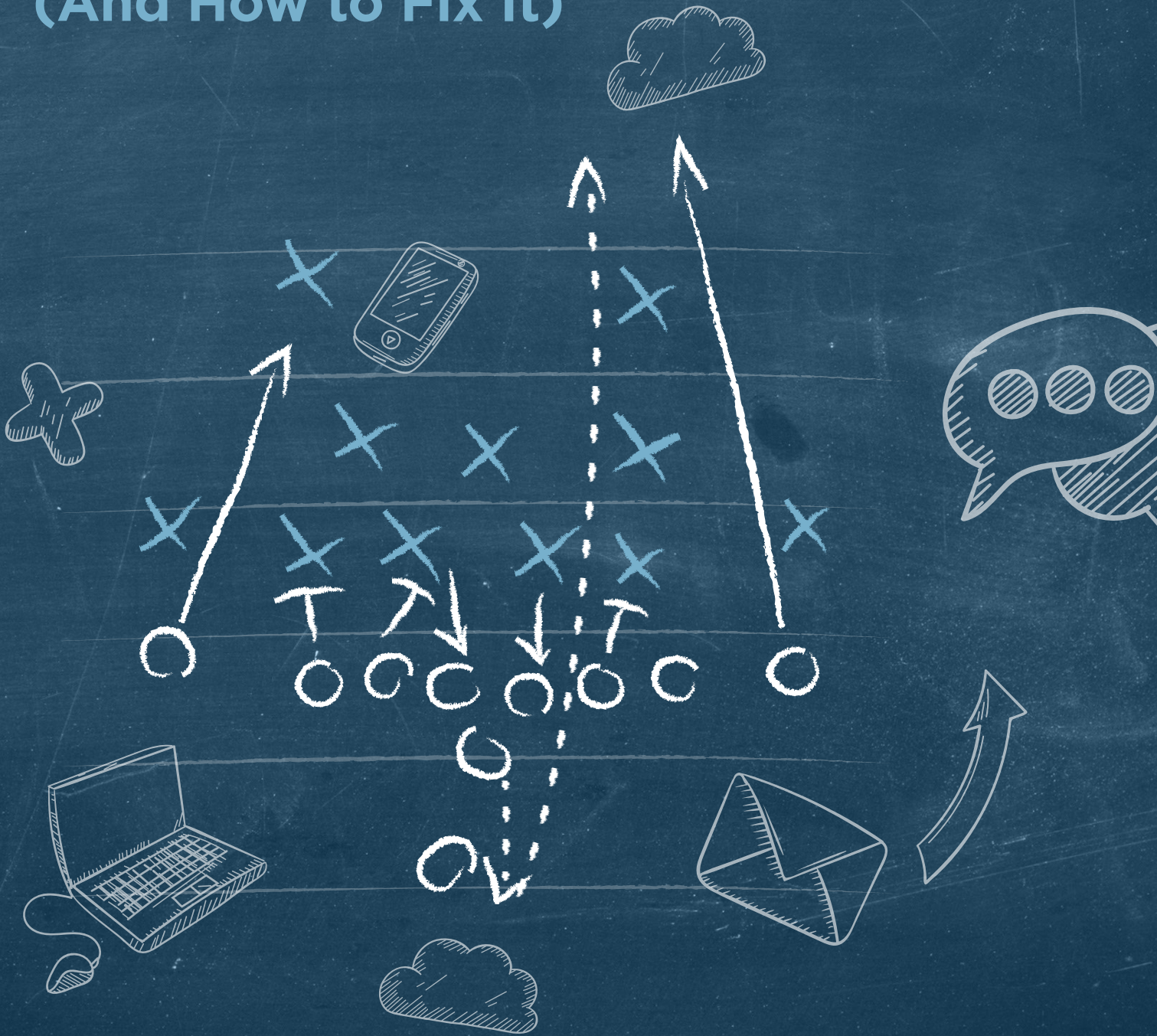
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Table of Contents

The Author
Kevin Binder is a Brand Journalist at Torrent Consulting and also spends time managing
Torrent's internal Salesforce org. Prior to his current role, he spent two years as a
Salesforce Consultant.

Why
Strategy
Matters toYour CRM

When implementing any CRM, your strategy (or lack of it) has a direct impact on user adoption. After all, your approach to the platform determines how it is built. The platform's functionality influences how users see the platform; everything from its UI to the process behind it can change your employees' productivity on the platform and their feelings toward it.

This fact is especially relevant to Salesforce. One of Salesforce's key strengths is its flexibility, but that means that your CRM strategy can have a greater impact on org functionality (and therefore user adoption) than it might have on a more rigid platform.

What's at stake? With the right strategy, you can end up with a CRM platform that enhances user productivity and adoption without sacrificing any of your business goals for the platform. With the wrong one, you'll build Salesforce in a way that drives users away from it, resulting in poor adoption and unreliable reporting.

Read on to discover the fundamental difference behind a "right" and "wrong" strategy, what each one looks like, and how to diagnose and fix any existing strategy misalignment to enhance user adoption and productivity on Salesforce.

Chapter 1

You Might Be Thinking About Your Salesforce Strategy All Wrong

When a business implements Salesforce, it's common for its executive leadership to think too narrowly about what the CRM will provide them.

They might picture it as if it's essentially a database — like it will be the source of all the data they need, a treasure trove of reporting. Their chief goals for a CRM implementation might revolve around the collection and cleanliness of data. They might send the message to their teams that Salesforce is the source of truth for their organization and if something isn't recorded in the platform, it doesn't exist.

Everything they're saying and thinking is technically correct, but concentrating only on these aspects of the tool can send the wrong message for its implementation.

Why?

Because **your Salesforce strategy shouldn't revolve around using the tool as a simple database or a data entry platform.** The technology can, of course, serve that purpose and offers good reporting power, but implementing it in this way will make your users think of it as an oversight tool that's been forced upon them.

The truth is, Salesforce platforms that focus on data cleanliness tend to hamper their users instead of helping them.

Users spend so much time filling out cumbersome forms and dealing with data validation errors that they can't get out of the platform and into the real world. Salespeople spend more time on the CRM and less time selling. Customer service reps are forced to spend additional seconds filling out information during each interaction, increasing the resolution time of every call (to the displeasure of customers).

In this world, Salesforce actually restricts its users. It keeps them from doing their jobs. This sort of Salesforce strategy allows leadership to track important metrics, sure, but in slowing down its users, it's actually making these metrics worse. Setting Salesforce up in this way is bad for user morale, bad for adoption and bad for business.

But what's the alternative?

The answer: Your Salesforce strategy should focus on its capabilities as a productivity tool, not a data entry platform. At its most powerful, Salesforce not only tracks important data but also reduces time spent on data entry instead of increasing it. Users can engage with the platform to pull the right information quickly and dynamically. Repetitive tasks can be automated, saving users hours of work each week. The right content can be pushed to your users wherever they need it: on their desktop, tablet or phone.

Watch Amazon's Director of Worldwide Partner Ecosystem, AWS discuss how their strategy focuses on end user ease of use:

Watch Here

The best part? Pursuing this sort of Salesforce strategy still gives business leaders the data they need. Once users see the CRM as their productivity tool, they tend to engage with it at a higher level. This leads to better user adoption.

In all, a simple shift in perspective is all that differentiates this strategy. The key is to engage with Salesforce as a user-focused tool when you're talking about it with your teams, building it and improving it.

Above all, it's important to think about your CRM implementation (present or future) and ask yourself: whose time is Salesforce saving? If the answer isn't "Everyone's" it may be time to consider a new Salesforce strategy.

Read how Salesforce saved the University of Michigan 40 hours/week here.

The next sections of this eBook go into greater detail to help you understand whether your Salesforce strategy is helping or hurting your users and their adoption. Compare your own company to examples of top-down and user-centric strategies that I've personally witnessed, evaluate your org's strategy and its impact on user productivity and consider productivity-boosting Salesforce tips.

Diving deeper will allow you to understand the effectiveness of your company's current Salesforce strategy and whether you're in need of a shift in direction.

Tip: For business leaders just starting down this path, we recommend following these high-level guidelines:

Listen to your users
They will ultimately be using the tool, so key developments in the platform should focus on addressing their pain points.

Mold the CRM to your process, not the other way around
User adoption is typically much better in a platform that fits into their existing work routines.

Be creative about getting the data you need
You need good data, but not at the expense of sales and service productivity. Consider ways of augmenting manual data entry by end users, such as integrating Salesforce with other platforms, using outside data services or hiring an admin team.

Chapter 2

Why Salesforce Strategy Matters for User Adoption — in 2 Case Studies

These two case studies come from my own consulting experience, to illustrate how different Salesforce strategies can lead to high or low adoption rates.

As a Salesforce consultant, it's sometimes easy to predict the success of a client's implementation well before the project is finished. While our goal is to provide the full value of the platform to every client, there are sometimes telltale signs that a team will not adopt Salesforce the way it needs to.

According to Academic Room, less than 40% of companies have adoption rates over 90%.

These signs always tie back to the company's Salesforce strategy.

As mentioned before, the Salesforce strategy you pursue can have a major impact on how the platform is perceived when it's rolled out to users. The question, as mentioned, is: Do users see Salesforce as their tool, or something that's being pushed on them?

In my time consulting on CRM implementations, I can think of two examples that illustrate this difference best. These cases demonstrate pitfalls to avoid when setting up Salesforce, and how to build a tool that your users can see as their own.

Case 1: The Top-Down Approach

One of my first projects involved a brand new implementation for a company we'll call Company X. Its CEO was forcing the company to start using Salesforce; he had success with the CRM at his last organization and wanted to see the same results.

Right off the bat, however, it was clear that it would be difficult to engage employees in the project, or with Salesforce in general.

What were the signs?

Lack of direction from leadership

Though Company X's CEO was the sole reason for the project, he was never in any of the meetings throughout the implementation. As a result, he never reinforced his message to the team about the importance of using Salesforce. Instead, the VP of Sales was responsible for the project. This VP didn't seem to see the use case for Salesforce. He understood what the CEO wanted, but didn't buy into the vision and never passed that vision down to his team.

Suspicion of leadership oversight

The VP's attitude toward Salesforce became contagious. It was hard for us, as consultants, to miss the wider team's mistrust of the CRM. They were all used to maintaining their own platform of spreadsheets to keep track of all of their relationships and deals. They thought this tool was being forced on them. They believed that it would constrain their personal working style and allow their CEO to keep better tabs on them.

Little team participation

For the reasons mentioned above, it was difficult for the Torrent team to find time with Company X's sales users to discuss the Salesforce implementation. They were always on the road — understandable for salespeople — and didn't seem to make the implementation a priority. It was rare for us to have full team attendance during our project meetings. We were tasked with designing a tool for them, but because Company X's users didn't understand that the tool could help them, we were unable to build the right platform for them — or even convince them we could.

A vicious cycle that can plague any implementation.

The result:

When we finally got to our training session at the end of the project, the sales users were unsurprisingly disengaged and distracted. Many users didn't remember details of the platform that we had discussed in meetings only weeks or days prior; they either weren't on that call or didn't remember it. Nobody completed their training exercises during the time we had planned for them.

Then, a few months after the project ended, we heard back from Company X. We asked them about Salesforce.

Turns out, nobody was using it. User adoption was almost at 0%.

Company Y's story starts similarly to Company X. Company Y's customer service team was using personal notebooks to keep track of all of their customer calls. Their director wanted to put this information in Salesforce, to share it among employees and speed their response times.

However, Company Y's strategy for implementing Salesforce was drastically different; it made a huge impact on user adoption.

What did they do differently?

Leadership communicated a consistent vision throughout the project.

Not only did Company Y's director communicate her vision for the platform throughout the project, but she also got her entire leadership team on board. Every person involved at this level — client services supervisors, the IT team, sales managers — reinforced the same message to their teams. Like every project, individual users occasionally questioned the purpose of implementing Salesforce or some of the decisions made during the project. At each turn, however, leadership reaffirmed their shared commitment to the success of the tool.

"Story can add flavor to the data in a way that you can move people."

*- Megan Himan, Founder & Principal, BrightStep Solutions on **how to boost adoption with storytelling**.*

They built the platform for their users.

Even before the build started, Company Y brought us into their offices to sit down with future platform end users. This allowed us to understand their day-to-day work and design a platform that would work for these users, not just for management. What's more, their leadership communicated to us multiple times that Salesforce was not to be used for employee performance evaluation.

Company Y's commitment to their users extended far beyond optics. Almost every aspect of the build itself related to ease of use. In our design meetings we heard the same questions again and again: What's the easiest way for team members to collaborate and share knowledge? How can we reduce the number of clicks? Can we improve the design of this page to make it clearer for users?

End users were heavily involved in every part of the project.

From design to build to test, Company Y made sure its users were involved in each step of the implementation process. Questions and objections were fielded during each Salesforce design and review meeting to make sure that the platform made sense to everyone.

After each round of building, management allowed end users to test the platform themselves and provide additional feedback. This process was even open to employees unaffected by the platform we were building!

Don't get me wrong, it was much more difficult to build a solution for Company Y than for the first company, Company X, because we needed to find ways to incorporate feedback from multiple users that occasionally disagreed with one another. However, the solution ultimately produced a more inclusive vision of what the tool could be.

The result:

When we got around to training, the users flew through the extensive packet of exercises we gave them, in half the time we scheduled. **They were already so familiar with the platform after all their testing that this "training session" was more of a dry-run than a learning exercise.** Users asked many questions that were on point, direct and about how to use the platform in their everyday work.

Once the training was over, I told them that they were one of the best training classes I had in my consulting experience. One of their users responded by asking about my worst training experience — if his was among the best.

And I told him the story of Company X.

If you think that your Salesforce org sounds more like Company X's and less like Company Y's, read on. The next chapter offers concrete signs that your strategy is killing user productivity and bringing adoption down with it.

Chapter 3

5 Signs that Your Salesforce Strategy Is Slowing Down Your Team

When working with Salesforce, there's occasionally a gap between possibilities and reality. The possibilities of the CRM platform are well-known: You see it in the company's online demo videos, in their success stories and at their events. And yet, some CRM implementations still fail or underachieve. Platforms are scrapped, user adoption lags or the platform simply doesn't deliver the results we all know are possible. This doesn't happen in all cases, but it still happens far too often.

Again, the end result can usually be traced back to a company's Salesforce strategy. Platforms designed as management tools tend to hurt user productivity and adoption, while those built as productivity tools do the opposite.

But, we recognize that it's hard to define what a "productivity tool" is and what concrete things make it different from a "management tool." Both are abstract ideas that are hard to pin down. That's why we've identified five real-life symptoms of a productivity-constraining Salesforce org. These signs should help you identify if your org is in need of a change in Salesforce strategy:

1. Your Salesforce administrator is frequently trying to fix user errors - Every time your users contact your Salesforce admin about an error, it's a work stoppage. Not only does the communication itself take time, but these problems also keep users from doing what they want to in the system. Errors, malfunctioning automations, insufficient privileges: All of these common issues keep your employees out of the system and drastically impede their work.

2. Your users don't understand how to use Salesforce - Even a well-built system will slow down your users if they are unfamiliar with how it works. Helping your users understand system navigation, existing automation rules and how to troubleshoot errors will allow them to work more quickly and comfortably in the system.

According to Academic Room, 72% of senior execs indicated they would trade CRM functionality for ease of use.

3. On average, your org has more validation rules than automations - A general rule of thumb: Validation rules slow down work, while automation speeds it up. Validation rules are incredibly helpful -- even critical in some cases -- but over-relying on them is a surefire way to frustrate users with new errors and hinder their work.

4. You hear the term "double entry," even once - Duplicate data entry is the ultimate scourge of productivity. Any time spent entering data repetitively is time wasted, and it has a multiplicative effect. Even if 10 users need 1 extra minute to re-enter data in a certain process, that translates to about **400 hours of lost time a year** if each user repeats that process 10 times a day.

On average, sales reps spend 64% of their time on non-selling tasks, according to Salesforce.

5. Users say they can't see the data they need. - In any business, every user needs some level of shared data access. Otherwise, Salesforce is nothing more than a fancy spreadsheet to them. Every time a user can't find the account, contact or opportunity they need, it costs your organization time. Either the user needs to stop their work to request access to the right record, or the user just creates a duplicate one (which makes for costly clean-up later).

Chapter 4
10 Tips to Improve Your Salesforce Strategy

So far in this eBook, we've mentioned how your Salesforce strategy can make a difference in how users think of the platform, either as an oversight tool designed for management or one focused on their productivity. We've also discussed signs that your org is constraining productivity instead of boosting it.

But if you're worried your company's Salesforce build is slowing down your team, what can you do about it?

Below, we've laid out 10 tips to improve your Salesforce strategy and overall org productivity. Starting with strategic ideas and ending with tactical tips, we lay out ways of moving toward a more productive technology solution. **Even one of these actions is a step in the right direction.** Put together, they lay out a basic blueprint for a user-centric org that focuses on your employees' needs and productivity, which goes a long way toward building user adoption in Salesforce.
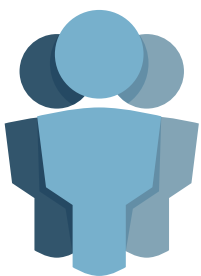
1. Invest in an admin team - Hiring a team of knowledgeable Salesforce admins will allow you to improve and maintain the platform much more efficiently than you could otherwise. From delivering on-the-spot training and best practices to troubleshooting errors and monitoring adoption, Salesforce admins deliver value to your business and allow you to execute on your Salesforce strategy in a nimble and effective way.

2. Iterate, iterate, iterate -

Your Salesforce org should never be set in stone. Your business changes; so should your Salesforce build. A key to any successful implementation is a willingness to listen to end users and to release consistent updates that alleviate their pain points.

3. Plan regular Salesforce training sessions -

Salesforce users are only as productive as their knowledge of the platform allows them to be. For this reason, training shouldn't be a blue moon type of occurrence; your Salesforce strategy should include regular training sessions to communicate recent changes and onboard new employees.

80% of high-performing sales teams rate their sales training process as outstanding or very good, according to Salesforce.

4. Always be on the lookout for new ideas -

The Salesforce ecosystem offers a wide array of products and third-party apps that extend the functionality of the platform and boost your team's productivity. Need to produce common forms automatically from Salesforce? There's an app for that. Want to integrate your phone platform for automatic call logging in Salesforce? Yup. Producing shipping labels directly from Salesforce and tracking packages right in the app? You get the idea.

The possibilities for your org are endless; your search for improvements should be, too. Get involved in the Salesforce community, search for new solutions online, attend Salesforce events. Understanding how other companies are using the platform to improve their business processes will help you determine the right solutions for *your* business.

5. Know your process, and build your tool around it -

A CRM tool will enhance the productivity of a company only if it fits into that company's existing workflow. In fact, the best tools not only follow the existing routine but also use platform features to automate and speed up that process. Technologies that force users to change their routines, meanwhile, often disrupt their productivity and bring more confusion than anything else.

6. Integrate to eliminate duplicate entry -

Want an easy way to slow down your employees? Force them to enter the same data multiple times. For added inefficiency, ask them to constantly compare information across different platforms. Maintaining separate platforms that don't talk to one another is a giant headache for any business. If your teams are facing this problem, the best way to improve their efficiency is to put all of your important data in Salesforce and keep it up to date (whether it's from your ERP, finance records or some other platform). Integrations require a serious investment to build and maintain, but the time they save your users is well worth the cost.

According to Academic Room,

51% of senior execs said that data synchronization was a major issue for their CRM.

7. Open your platform sharing as much as possible -

Every organization needs some level of security — many companies have private information somewhere in Salesforce that can't be shared widely. However, restricting data access too much will severely hamper employees' efficiency and collaboration efforts, build restrictive silos of information and make employees feel untrusted. It pays to develop a consistent Salesforce security strategy that shares as much data across teams as possible without compromising sensitive information.

8. Customize your UI to your users and teams -

Your marketing team probably doesn't need to see cases, and your customer service team doesn't need to see leads. Salesforce Lightning allows you to build highly customized pages for each team and type of record. Tailoring each group's view of the platform to the information that's most relevant for them will allow them to work more efficiently in the platform.
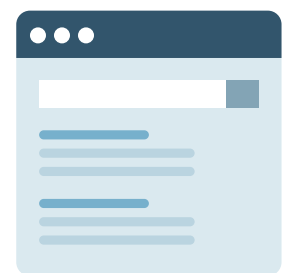
9. Make the mobile app part of your workday -

The Salesforce1 mobile app offers quick access to Salesforce — even without WiFi — and allows team members to log interactions, take notes and make quick updates without booting up their laptops. The UI and functionality are different from the web-based version of Salesforce, however, so it's a worthwhile investment to customize SF1 to your company's needs, train users on the app and encourage them to make it a part of their day.

According to Nucleus Research, on average, teams saw a 14.6% increase in productivity from mobile capabilities of their CRM.

10. Use quick actions -

Salesforce quick actions are a great way to boost the productivity of your workers; they allow users to create new information without filling out every field. Not only do these buttons auto-populate information on the new records, but they also shorten the form users need to fill out for these objects, concentrating on the most important information for them to enter off the bat.

So what's the next step? Meet with your team this week and identify which of these tips can help improve productivity in your org. Sort the relevant tips by the timeframe they can be accomplished in (the tactical tips at the bottom represent quicker wins, while the ideas at the top require larger strategic shifts). Accomplish some quick wins within the next month, and build a plan to implement larger changes moving forward.

With the right combination of quick Salesforce enhancements and proper strategic guidance, your user's productivity on and adoption of your Salesforce platform will dramatically increase. The investment will be well worth it.

About the writers:

Some business leaders think that working with a Salesforce firm means consultants come in, grab your requirements, build out Salesforce, flip the switch, train the team and then leave. That's not the case with Torrent. We act as an external champion and CRM specialist that helps bring to life your unique business vision. Then we configure your Salesforce environment in a way that enables that vision and fits within the current processes of your team.

We're an accredited Salesforce partner, which means you get the benefit of an experienced team and access to best practices across every industry. We're passionate about Salesforce and work tirelessly to ensure buy-in and excitement from every member of your team. Salesforce ROI is our objective.

Let's continue the discussion