



# 9 Signs You Need a Salesforce Consulting Firm



**Build Something Greater.**

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# Why work with a Salesforce consulting firm?

There's no question that Salesforce is changing the way companies do business.

[According to research](#), organizations using Sales Cloud show a...



**52%**  
increase in  
lead volume



**27%**  
boost in  
win rate



**34%**  
rise in sales  
revenue

Getting the most out of Salesforce can create powerful results for your company. But here's the problem: The vast majority of organizations lack the time, resources or expertise to **fully** utilize the platform's potential benefits.

That's where Salesforce consultants come in - with the goal of helping to accelerate the ROI on your CRM investment. They ensure that you don't get a mere tool implementation, but a business transformation. They help you avoid common implementation failures and mistakes, as well as use the new technology to achieve your desired outcomes.

As Andrew Friedenthal, CRM analyst for the online [reviews firm](#) Software Advice, explained: Salesforce consultants make it their full-time job to understand the ins and outs of the system. They use tools like hands-on training, process documents and industry best practices to help businesses get the most out of their Salesforce purchase.

"As with any large problem, sometimes an outside eye can come up with a solution much easier than can somebody mired in the details," Friedenthal said.

So, do you really need that outside eye? **Ask yourself if any of the following 7 signs are true for you, and you can quickly find out...**

## Sign #1

# You don't have the capacity to run a proper implementation.

Failed CRM implementations are surprisingly common. In fact, research shows that [more than 60 percent](#) of CRM initiatives fail. This happens for a number of reasons: Management doesn't know what they want from the system (other than "more sales"); no one bothers to get end-user buy-in for the new tools; training is subpar or passed over entirely; incomplete system configurations ... the list goes on. Some organizations have to roll out Salesforce multiple times.



### Fast Fact

**Companies often fail to achieve their desired business results with customer relationship management.**

[According to Forrester](#), less than 50 percent of organizations say their expected business results from CRM were met or exceeded.

Salesforce is more than just a new tool to your team; it transforms the way you do business. Because the platform is so expansive, implementations require weeks (sometimes months) of planning, configuring, testing, training and integrating before completion.



"Technology, itself, will not solve all your organization's pain points. A well thought-out implementation of a strategic solution could, however, deliver a high-business value in a complex environment."

- Tal Frankfurt,  
Founder and CEO of Cloud for Good

If you aren't able to manage this comprehensive project, you should absolutely work with a Salesforce consulting firm. They'll help you develop and execute an implementation plan that ties directly to your desired business results.

## Sign #2

# Your Salesforce instance has missing and/or bad data.

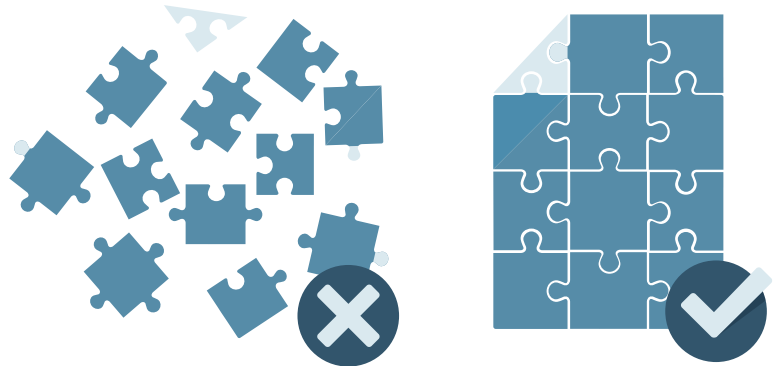
Does your CRM have duplicate records? Are contacts records full of incomplete fields? Do you question the trustworthiness of your Salesforce reports? If you answered yes to any of those, you're suffering from a common CRM problem: bad data. It prevents you from conducting any sort of actionable reporting or analysis within Salesforce, as well as having the 360-degree view of customers that modern businesses desperately need.



“The true value of keeping your data in Salesforce is that you can report on it using pre-built or custom reports. With reports, you can create visibility amongst your co-workers and management teams and use the data to create actionable metrics and dashboards.”

- Luc Arnold,  
Salesforce.com Success Account Manager

Bad data is the **second-largest issue** among Salesforce users, which explains why data cleansing apps are among the top investments on the AppExchange. A Salesforce consulting firm can help. Not only have these consultants encountered this problem numerous times before, but they'll know the best methods to clean your data. They'll also likely implement a system to prevent bad data from getting into your CRM again.



## Sign #3

# You have poor Salesforce adoption.



“It doesn’t matter how great your Salesforce solution is if users don’t — or won’t — use it. It’s not enough to just give your team a great app; you also need to train, support and give them a sound reason to adopt it.”

- Jean-Baptiste Minchelli,  
Salesforce Senior Director of Product Management,  
Lightning Enablement and Adoption


One in four Salesforce customers are challenged with user adoption, and less than half have a comprehensive adoption strategy. This is often due to an inability to help users understand the value they get from using a CRM. Without buy-in, end users can easily think using a CRM is merely an annoying side task for them to complete, a complicated system they don’t understand or even a “Big Brother” tool for micromanagement.

“If your sales team is complaining about the new system (beyond the usual level of complaining about something new), or having continual trouble navigating it, then you want to be responsive to their needs and figure out what resources (inside or outside the company) you should bring into play in order to solve those issues,” Friedenthal recommends.

You might experiment with different adoption strategies on your own, but Salesforce consultants will oftentimes help you reach success much faster. Their answer might be to reconfigure Salesforce. Or, you might need to purchase another application from the AppExchange to get the full value from the platform. Regardless, Salesforce consulting firms know multiple strategies for adoption success. They’ll help you determine the best one based on your organization’s specific needs.

## Sign #4

# You don't have in-house Salesforce expertise.



Salesforce is expansive. You need an internal expert to customize the platform in a way that supports your organization's sales process. And your IT team is not always the answer. Ideally you'll plug in someone who understands the code and the business cases that support Salesforce changes.

The value of a cloud platform like Salesforce is that non-IT workers can modify it with limited or no development. A sales team (and the support that team receives from other groups across the company) should be able to work out their own kinks with Salesforce, Friedenthal explained. Unfortunately, he added, a lot of businesses lack the time, resources or IT know-how to actually achieve this.



“Yes, the Salesforce platform allows you to create your own objects and even your own user interface (UI) if you want to. At the same time, it's important to understand the implications of over-customization and the business challenges that result from it — and it's important to us that our products minimize the need for custom code.”

- Max Rudman,  
Salesforce Vice President,  
Product Management, CPQ

Hiring a Salesforce administrator isn't an option for many companies. This is another area where a consulting firm is extremely helpful. Salesforce consultants are very knowledgeable about the platform and specialize in helping businesses get the most out of its capabilities. Their experts will customize your platform the way Salesforce is meant to be configured, instead of trying to stick it together with custom code.

## Sign #5

# You don't have time to manage your Salesforce environment.

Optimizing the way your organization uses Salesforce is an ongoing project. You'll need to manage users, create dashboards, fix errors and keep up with new Salesforce tools and best practices. You could make this a part of someone's job, but those tasks could quickly become so numerous that they overtake that employee's primary role.



“Regardless of your company’s size, requests will start to come in — some from users, some from leadership, some from business owners. How will these be prioritized? Will these requests be viewed myopically as they hit [someone’s] inbox or seen holistically against the company’s long-term strategy for using Salesforce?”

- Shell Black,  
Salesforce MVP

For this reason, many Salesforce consulting firms will manage your entire Salesforce instance for you. In addition, they can create strategic roadmaps and consult leadership on business processes and potential improvements.

### Fast Fact

#### **Not managing your Salesforce environment can cost you money.**

[A study from Flexera](#) found that 44% of enterprises said they paid \$100,000 or more in true-up costs to their software vendors as a result of noncompliant software use; 20% said their software audit true-up costs were \$1,000,000 or more.



## Sign #6

# You can't prove the ROI of your Salesforce investment.



This is a common pain point for chief financial officers, who need to justify CRM investments. ROI can be demonstrated in a number of ways: increase in yearly sales per rep, hours saved on administrative tasks per week, customer lifecycles mapped in Salesforce, etc. What matters is that you can prove a return on your CRM investment.



“Over the past two decades, companies have been turning to CRM to increase business value and improve relationships with customers. But the definition of value differs for each company and impacts how they select and implement a CRM.”

- Robert DeSisto,  
Chief Value Officer at Salesforce.com

If you're spending \$100,000 on Salesforce licenses this year and \$150,000 on an implementation, how are you going to come up with \$250,000 in additional revenue to make up for that? Salesforce consultants know how tie to your business objectives with the products you've purchased. They'll help you calculate the ROI of your CRM, even if that means tying it to top-line revenue growth. And in the chance that you're not seeing ROI? They can help you fix that.

## Sign #7

# Salesforce defines your business processes.



“The only way you’ll get buy-in and full cooperation is if the CRM becomes a natural part of their workflow and increases productivity.”

- Adrian Davis,  
the author of “Human-to-Human Selling”

Instead of configuring Salesforce to work with the current processes, many organizations make the mistake of expecting the software to define the process. This frustrates end users to no end. Not only are they being told to use a new software, but they also need to adjust their processes in order to actually use the software. Or the software might simply make it harder to use their current process — an equally frustrating feat.



“If you have purchased and implemented Salesforce, but find that your sales team is suddenly less effective than they were before, that’s a good sign that you have a problem that needs to be addressed,” Friedenthal suggests.

A major benefit of working with Salesforce consultants is that they know how to create Salesforce workflows that simplify processes for end users (instead of complicating or changing them entirely). They focus on rigorous training and offer support for any questions or concerns about integrating CRM tools into daily routines.

## Sign #8

# You have customer data in systems outside of Salesforce.

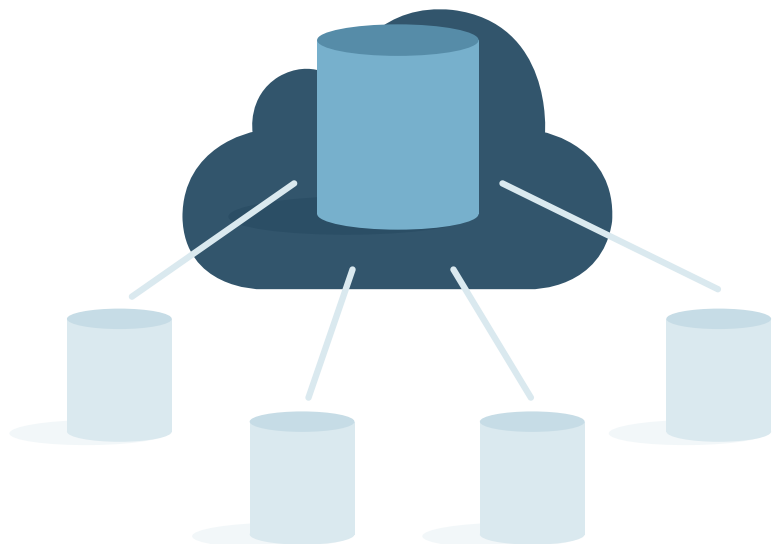
Keeping information about your prospects and customers in disparate systems can (and likely will) create all sorts of problems. You might cold call and pitch a company that's been a customer for three years or accidentally send marketing emails for a specific product or service that is completely unrelated to a certain group of people. These mistakes reflect poorly on your company. They might even lead customers to believe you don't care enough about them to fully understand their data.



“Integrating other systems with Salesforce can bring new levels of efficiency to processes that span different departments.”

- Dan Oxenburgh,  
VP of Marketing, Jitterbit

Even if you do need to use multiple systems, they should at least talk to each other. Can you really afford to use precious time and resources having people enter the same data into separate databases? Of course not. Salesforce consultants offer tactical advice and integration services for projects that range from simple email integrations all the way to complex, ERP integrations involving multiple systems.



## Sign #9

# You want more Salesforce tools, but don't have a roadmap.



“The key to successful innovation is accepting that not every technology is right for your business. Selecting the right technology requires steely-eyed focus and clarity of purpose. Instead of pondering whether AI or VR is the ‘best’ or ‘coolest’ technology, you should be asking, ‘Which new technology will help my business stay competitive and relevant over the next 100 years?’ ”

- Saul Kaplan,  
Business Innovation Factory Founder and  
Chief Catalyst and Mia Dand, Lighthouse3 CEO

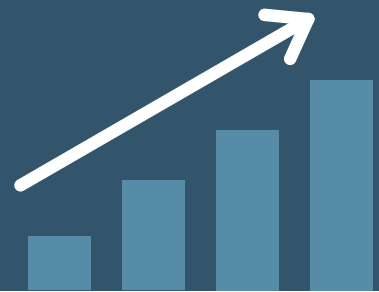
Building out your tech stack without a strategic plan in mind is the fastest way to acquire “shelfware.” Purchasing apps is easy; getting your money’s worth out of them is not. And it all adds up, you could be spending upwards of half a million dollars on sales technology each year.

### Fast Fact

**Most companies have wasted money on software.** 93% of organizations report spending money on at least some software that is underused (shelfware), and 30% of companies said that 21% or more of their software spend is associated with shelfware, [according to Flexera.](#)

Salesforce consultants help you build strategic roadmaps for your company, and then work with you to determine where and when new technology comes into play. Consulting firms that are [certified Salesforce partners](#) have an extensive knowledge of the Salesforce ecosystem. They can expose your company to the thousands of different AppExchange apps that can help solve your problems.

# What kind of ROI can you achieve?



Deciding to work with a Salesforce consulting firm can yield a lot of ROI for your organization. With a Salesforce consulting firm...

## **Elance** | **QDesk**

was able to:

- Generate 35% more qualified opportunities in the first quarter after workflow changes and insidesales.com implementation
- Increase visibility and accountability through dashboards and gamification
- Establish a trusted and ongoing strategic Salesforce implementation partner

## **STRIKE** **CHECK**

ELECTRONICS CLAIMS INVESTIGATORS

Transformed its national field workforce strategy by reducing turnaround time on field reports and enjoyed benefits including:

- Reduction of average turnaround time of field reports by 50%
- Reduction of handling time of reports by 40%
- Improved accuracy of information
- Increased visibility of field activity of hundreds of workers



was able to save money, increase revenue and move most of their business to the Cloud, which resulted in:

- A 50% reduction in annual hardware and software costs for claims processing technology
- Reduced claims processing handling time by 65%
- The ability to support a 3x increase in call center staff over 12 month period
- Increased visibility and collaboration across teams

## **TRUVEN**

HEALTH ANALYTICS

implemented their project on schedule and enjoyed the following benefits:

- Reduction of the project schedule by four months using an outside vendor
- Establishment of a development partner that can be leveraged for other product development initiatives
- Improved client relations by delivering a strong mobile experience



was able to:

- Achieve the second highest number of closed-won opportunities in the history of their Salesforce use
- Not only capture and nurture their leads, but measure and increase response time effectively
- Track progress with a robust and dynamic dashboard

Want to learn more about how a Salesforce consulting firm can improve your business processes and accelerate the return on your CRM investment?

[Click here to contact our team](#)

We're ready to help you **Build Something Greater.**



## 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](#)