



Point of View

# 5 Steps to Improve Your Salesforce ROI

by Dmitri Novomeiski

One of the most common enquiries we receive from IT and business leaders in Global 2000 companies is –

“How do I get the maximum value from investment into the Salesforce platform?”

As we know, Salesforce has emerged as a leader in digital transformation. Traditionally viewed as a front-office tool, use cases around employee collaboration, business continuity, risk management, and general modernization grew with its increased breadth of adoption. However, leaders are under pressure to validate the investments and show realization of business value.

## Three Vectors to Measure Value of Impact

To measure opportunities of maximizing investment value and the impact, businesses are looking across three main vectors, i.e. Impact on Revenue, Impact on Customer Experience, and Impact on Risk.

	Revenue Optimization	Customer/Partner Experience	Compliance and Risk Management
Sample Outcomes	<ul style="list-style-type: none"> <li>• Revenue Growth.</li> <li>• Profit margin improvement.</li> <li>• Operational Cost Decrease.</li> </ul>	<ul style="list-style-type: none"> <li>• Improvement of Net Promoter Score [NPS] improvement.</li> <li>• Increase in Customer share of wallet.</li> <li>• Decrease in Customer Attrition.</li> </ul>	<ul style="list-style-type: none"> <li>• Decrease in # of High-Risk Areas/Incidents.</li> <li>• Decrease in Risk and Tolerance Scores, etc.</li> </ul>

## 5-Step Process to Get More from Your Salesforce

Exploring these three dimensions and the direct impact of investment in Salesforce, here's a 5-step strategy to create a scalable and outcome-generating technology investment in Salesforce by any large organization.

### ✔ **Building a healthy foundation**

Business needs take priority, increasing technical debt as a result. Here are some key elements to consider for house cleaning:

- Remove dead code: unused methods, classes, lines of code.
- Optimize your code in alignment with Salesforce practices.
- Clean up your fields, screens, rules, profiles, roles, etc.
- Automate future quality validation and control to ensure ongoing hygiene.
- Leverage componentized and micro-service friendly architecture.

### ✔ **Stitch the process**

Integrating and connecting the processes end-to-end enables better decision-making and eliminates the cycle time related to cross-functional hand offs. The following are some improvements that can offer the biggest bang for your buck:

- Tight marketing integration and refinement of the marketing tollgates and hand-off akin to Demand Waterfall™ by SiriusDecisions.
- Close integration of Quote to Cash processes (contracts, pricing, order management, etc.)
- Tight integration with other customer engagement systems such as e-commerce or field service facilitates further process automation and easier context switching.
- Bring forward process automation to minimize manual churn.

### ✔ **Enable touchless/low-touch sales & service**

Frequently, the amount of time and effort spent by an organization to complete a simple or a complex task ends up being the same. When fulfilling a service request,

a lot of the effort tends to contain unnecessary churn that can be eliminated or automated in order to make the selling or service cycle a self-managed process. This allows internal teams to focus on larger and more complex tasks. By enabling a touchless experience for the long-tail or smaller deals and requests, an organization can decrease the cost of sales and direct people-centric efforts towards improving the bottom-line. Here's how:

- Bring a consumer experience in the business buying cycle by employing e-commerce tools, customer profiling and segmentation, and omni-channel bring core of these capabilities.
- Enable a high-level of engagement and personalization.
- Build the ability to quickly change an engagement channel from low touch to high-touch to minimize churn.

### ✔ **Get more out of your channel/affiliates**

The channel and affiliate business is a treasure trove for almost any organization. However, the growth and engagement of channel partners with a brand requires making their experience as easy as possible, while empowering them with tools they need to be most effective. Partners want to be treated with immediacy just like your customers so that they can be more effective. The following capabilities resonate highly with their needs:

- Enable self-service – pricing, contracting, quoting, and orders.
- Real-time personalization of content.
- Proactive and next-best action engagement that can guide the channel partners through their sales cycles and help proactively identify focus areas.

### ✔ **Seek edge use cases**

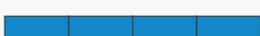
More than any other platform, Salesforce provides opportunities for enabling new capabilities at speed. Digitizing some of the manual-intensive work with Salesforce can start generating additional value for your business and enable a Center of Innovation in the organization. The following steps can help achieve this:

- Allocate part of your IT spend to pure innovation and experimentation on the platform.

- Actively crowdsource ideas from stakeholders – employees, partners, and customers and reward them.
- Explore emerging tech, but also experiment with moving manual and boundary processes that may correlate to your partners, customers, or employees.

## The Outcome Benefit Matrix

The chart below illustrates the outcome impact of above mentioned focus areas in the key organizational needs around Revenue, Experience and Risk.

	Revenue	Experience	Risk
Healthy Foundation			
Stitched Process			
Touchless/Low Touch			
Affiliate Management			
Experimentation			

## Conclusion

Getting more value from the Salesforce platform doesn't necessarily require additional license expenditures. You can achieve this by improving the existing architecture, enabling automation, bringing existing capabilities closer together, and actively

experimenting with the platform for innovation-friendly capabilities. The five-step process detailed above is a high-level blueprint for helping you get to the next level of returns from your Salesforce implementation. These steps offer you a framework to adopt Salesforce successfully, so you receive immediate benefits while setting up the platform for future growth and increased value.



## Author Profile



### **Dmitri Novomeiski**

Practice Head and Area Vice President, LTIMindtree

Dmitri is the Salesforce.com Practice Head and Area Vice President at LTIMindtree. Dmitri brings over 16 years of experience in enabling customer transformation through technology and business. He has held various leadership roles at companies like TCS, Pactera Technologies, and Autonomy. Dmitri brings strong business, marketing, process, and technology backgrounds and unwavering focus on delivering tangible results to his constituents. He is well-published and has been an ardent evangelist of Cloud Computing and Salesforce.com platform since 2002.

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