



Holistic Digital  
Transformation  
for Fast-Growth  
Companies

# RSM'S SALESFORCE BUYER'S GUIDE

THE POWER OF BEING UNDERSTOOD  
AUDIT | TAX | CONSULTING



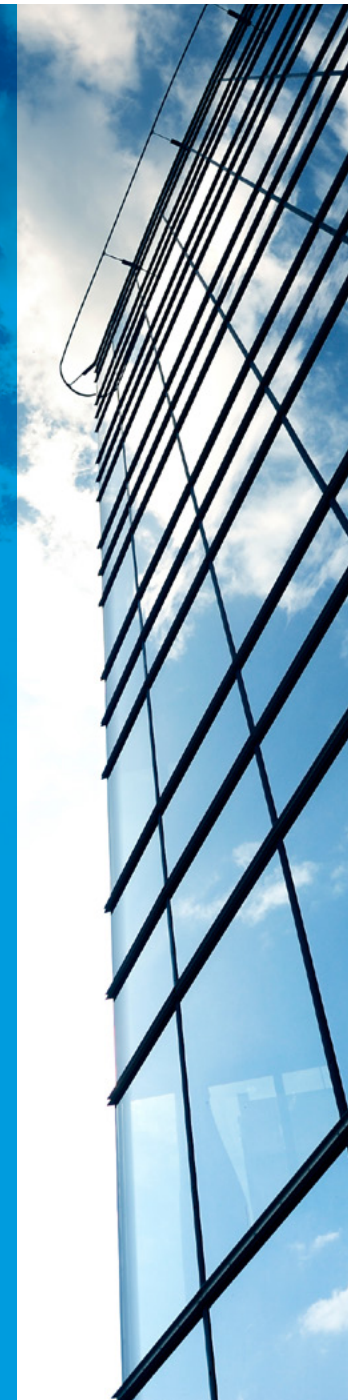
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➤ **The purpose of this guide is to help you learn more about Salesforce and its cloud-based customer relationship solutions, as well as the many benefits of partnering with RSM to unlock and maximize the business value of Salesforce's SaaS platform.**

In the following pages, you'll find in-depth information on Salesforce technology—including its offerings, capabilities, value and benefits—as well as the industries that Salesforce serves.

You'll also learn why RSM is the best partner to help your company implement and optimize a Salesforce solution: RSM is a Platinum-tier Salesforce partner, has hundreds of Salesforce clients and has successfully completed thousands of Salesforce projects.



# OVERVIEW OF SALESFORCE

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Salesforce is the world's #1 customer relationship management (CRM) platform, with more than 150,000 companies using it as a key enabler to drive business growth. Its cloud-based technology brings together a company's marketing, sales, commerce, service and IT teams from anywhere in the world.

The Salesforce Platform allows your teams to store, track, manage and analyze sales prospects and customer data in one central location, including sales opportunities, contact and account information, services cases and marketing campaigns. Together, it empowers you to obtain a 360-degree view of the customer. This enables everyone at your company to focus on what's most important: delivering exceptional customer experiences.

Salesforce is utilized and valued across all industries and sectors. Whether your organization operates in technology, business services, nonprofit, retail, health care, life sciences, manufacturing

or any other of the many industries it serves, Salesforce offers solutions that enable you to connect with and deliver services to your customers. An experienced partner like RSM can help customize the Salesforce Platform to your unique industry and organizational needs and develop a strategic solution that connects all parts of the business.

The Salesforce Platform is adaptive, flexible, scalable and secure. Regardless of your organization's size or industry, Salesforce flexes with your changing needs. It includes a development platform for ultimate customization, as well as robust, open APIs to integrate almost anything in your tech stack. It has an ecosystem of more than 8,700 partner apps and services, making customizations easy and tailored for every company. Ultimately, the Salesforce suite of products and services helps 98% of its customers meet or exceed their return on investment (ROI) goals.



“ We have partnered with RSM to help optimize our current processes, set up the guiding principles and align us to best practices while still understanding the nuances of our business. It is a true partnership that has really made our project successful. ”

**MINDY FIELDS**, VP of Sales Operations, LastPass





# Salesforce's offerings

Salesforce offers a wide variety of products for each organization's unique needs.

The full portfolio of Salesforce products and services—brought together in one powerful platform as Salesforce Customer 360 (C360)—allows all your marketing, sales, commerce, service and IT teams to operate from a single source of truth. That way, everyone can work from the same data and get a true, consolidated view of their company's customers. On average, 98% of C360 users meet or exceed their ROI goals, gaining 29% faster insights while decreasing IT costs by 25%. Some of Salesforce's most popular offerings include:

## > **Salesforce Sales Cloud**

Helps salespeople sell smarter, faster and more efficiently by centralizing all of their company's customer relationship management information (e.g., customer contact information, notes from customer interactions, technology solutions in use and other data) and leveraging artificial intelligence to automate many of the time-consuming administrative tasks that salespeople do every day. This allows sales teams to use real-time customer data and focus more of their time on closing sales deals, while enabling their company to increase productivity and scale their sales operations.

## > **Salesforce CPQ (or Configure, Price, Quote Software)**

Enables companies to speed up sales cycles by giving reps the right tools, like guided configuration, built-in pricing approvals and single-click quote generation. Salesforce CPQ connects the front and back office, automates workflows to help sales and finance work together, scales recurring revenue streams and the closing process and optimizes the buyer experience across every channel.

## Salesforce's offerings

### 3 > **Salesforce Service Cloud**

Allows your team members to automate and personalize customer support across channels, portals and devices. Moreover, it enables your company to streamline workflows, route cases to the right agents, provide the right knowledge to customers, solve support cases and automatically manage SLAs and escalations. Service Cloud helps foster a one-to-one relationship with each of your customers across multiple channels and devices, increases productivity and decreases support volume per customer by 26% across channels.

### 8 > **Salesforce Field Service**

Provides your company with a platform to transform your field service operations and automate and optimize processes for your field services workforce (such as agents, dispatchers and mobile workers). By using this solution, your team can perform critical field services functions like scheduling and dispatch, route optimization, work order management, asset management, inventory management, resource management and more.

### > **Salesforce Service Cloud Voice**

Delivers telephony features such as remote agent capabilities, service console integration and automatic call transcription so that you can seamlessly communicate with customers and close cases faster.

### > **Salesforce Experience Cloud**

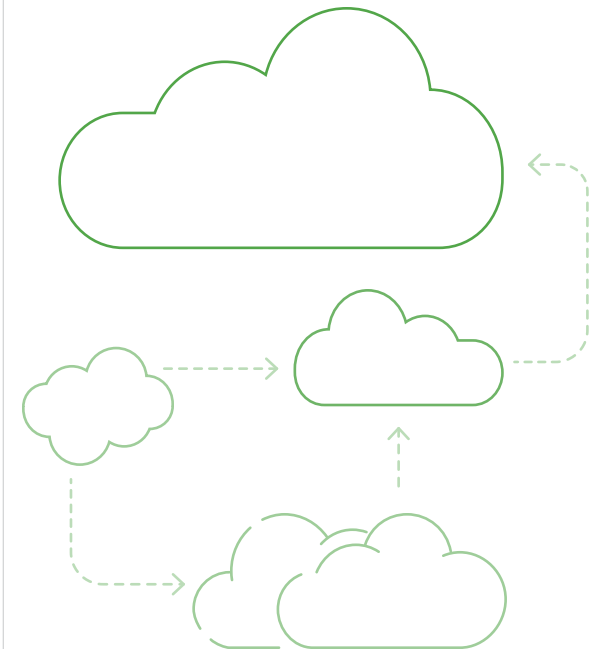
Enables you to transact with your customers, partners and employees 24-7 and improves case deflection and customer experience. Experience Cloud sites include customer portals, developer portals, interactive communities, partner deal registration and enablement portals and more.

### > **Salesforce Nonprofit Cloud**

Reimagines program management, case management, grant management, marketing engagement, outcomes and fundraising in a single solution. Recently redeveloped, the new Nonprofit Cloud is built specifically for the nonprofit sector. It breaks down silos between teams, secures data, unlocks insights, integrates tools and, most importantly, frees up more time to deliver programs and achieve your mission.

### > **Salesforce Marketing Cloud Engagement for Nonprofits**

Helps nonprofits deliver meaningful, scalable experiences to their communities. This purpose-built marketing technology solution fully integrates with data in the Nonprofit Cloud, empowering you to engage supporters with personalized email campaigns. It helps you raise funds, expand your community and bring your teams together with shared goals, strategy and messaging.



# WHO RSM IS AND WHAT WE DO

RSM is the leading provider of audit, tax and consulting services focused on the middle market. With over 73,000 clients across 20+ industries, we deliver top technology, financial, transaction, risk and business consulting services.

Our consultants have deep experience in the industry-specific challenges and opportunities that our clients face. We're committed to understanding each company's unique situation and constantly working to address the most important issues in their industries.

With more than 13 years of Salesforce experience, over 1,000 completed projects and a 4.9/5 customer satisfaction score, RSM is a go-to Salesforce consulting partner. Our team of advisors and developers has earned more than 240 Salesforce certifications and Platinum status, the top partner tier at Salesforce. We have the knowledge, experience and best practices required to maximize the value of any Salesforce solution.



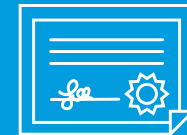
**13+** Years  
Salesforce  
partner



**100+** Systems  
integrated with  
Salesforce



**20+**  
Industries and  
sectors served



**240+**  
Salesforce  
certifications

**780+** Clients worldwide



**4.9/5**  
Customer  
satisfaction rating

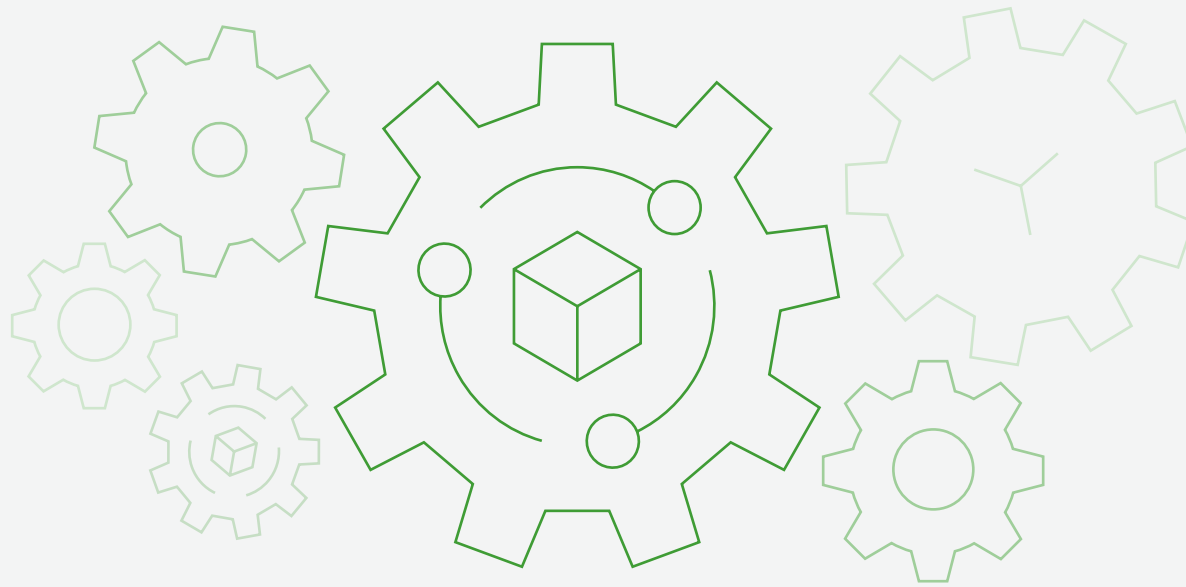


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# RSM's Salesforce solutions

RSM offers a full range of Salesforce solutions to digitally transform your company now and in the future.

We combine our extensive Salesforce knowledge and experience with our deep industry practice, understanding of strategy and business function and adjacent technology skill set.

- **Full quote-to-cash transformation**  
RSM provides a full set of services for companies embarking on a complete digital transformation of the quote-to-cash process. The RSM team often starts with an assessment to fully understand the strategy and operations of the client to best determine and align to the business vision, target operating model and technology road map. Salesforce plays a big role in the QTC process, providing integrated solutions for Sales, Quoting, Billing, Integration, Partner Relationship Management (PRM) and more. RSM also ensures a seamless QTC solution by providing expertise in many of the other critical components of QTC, including contract lifecycle management, order management and delivery, customer onboarding, billing and AR, FP&A and management reporting and revenue recognition.
- **Customer experience transformation**  
RSM can digitally transform your entire customer management process to create a seamless, branded experience that delivers value to your client in whatever channel they wish to transact with you. This ranges from automating your customer service processes to

## RSM's Salesforce solutions

creating new experiences, such as social media engagement and customer and partner portals that include sophisticated self-service capabilities like chatbots, customer communities and forums and intelligent knowledge base suggestions.

### > **Salesforce org and data migration**

RSM provides a team of experienced professionals that handles the full lifecycle of mergers and acquisitions (M&A360), as well as a set of Salesforce services to support a client's strategic needs—from assessment and due diligence to merging or carving out Salesforce orgs as part of a divestiture.

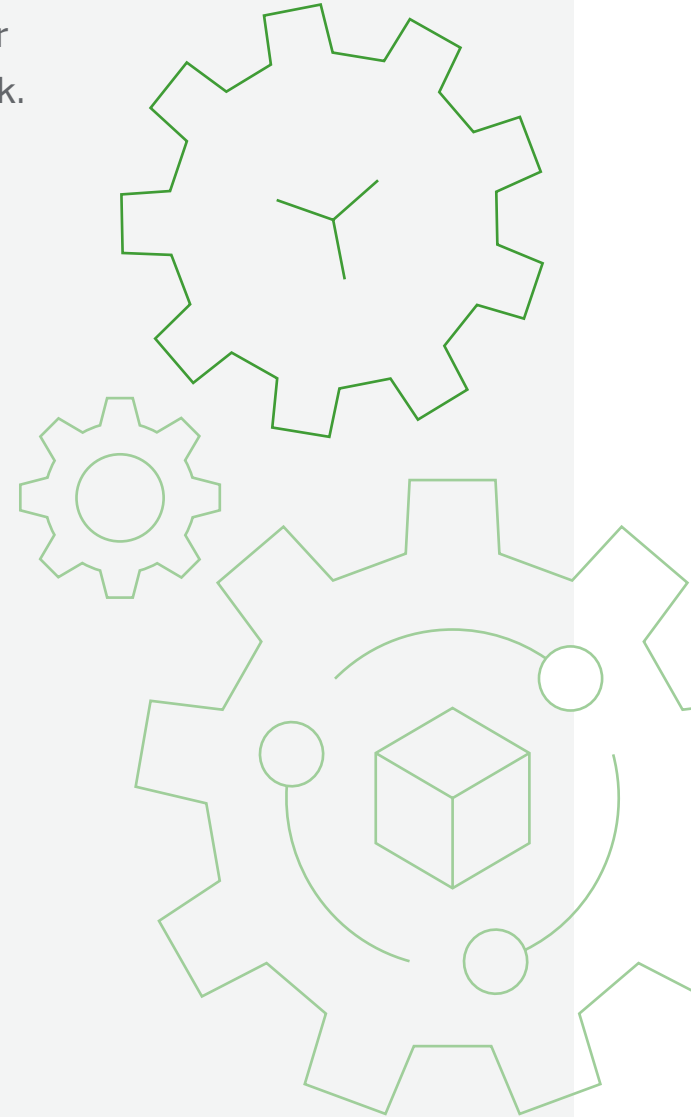
### > **Data analytics solutions**

RSM can implement Salesforce's powerful suite of reporting and analytics tools. Together these tools help you understand your data and act on it, as well as distribute actionable insights to business users. Salesforce's CRM Analytics—formerly known as Tableau CRM—is a cloud-based platform that connects data from multiple sources, creating interactive views of that data that can easily be shared in apps.

RSM can integrate several other solutions into a Salesforce stack. For example,

➔ **MuleSoft** is a platform that gives your IT team the tools it needs to automate everything, including integrating data and systems, automating workflows and processes and creating incredible digital experiences.

➔ **Nimble AMS** (Association Management System) is an enterprise solution that helps take associations to the next level by making it easier for them to process orders, manage events, analyze data and create a stellar membership experience.

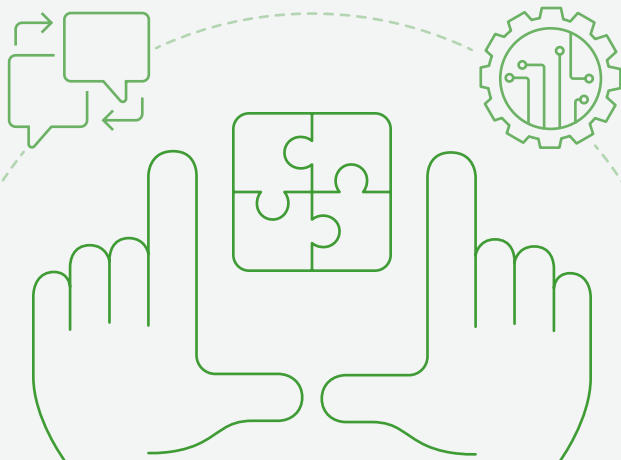


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# RSM's Salesforce services

RSM is the leading provider of Salesforce consulting and development services for the middle market. What sets us apart from other Salesforce consultancies is our extensive experience with business process, strategy, finance, security, ERP, billing compliance, tax and more. Because every client and Salesforce project is unique, we also approach each engagement as a partnership and offer the trust, transparency and operational excellence that goes with it. RSM's Salesforce services include:



## › **Salesforce assessments**

RSM's team of consultants can conduct a rapid assessment to assess your current state and align Salesforce to achieve your business objectives.

## › **Salesforce digital transformation**

RSM can help you obtain speed to value on digital transformation initiatives such as quote-to-cash and customer experience.

## › **Salesforce optimization**

RSM's experienced advisors can significantly improve your existing Salesforce solution to meet changing business needs.

## › **Salesforce integration**

RSM's team can connect one or more systems together

with Salesforce, such as ERP systems, internal platforms and third-party apps.

## › **Salesforce data migration**

RSM's consultants can efficiently transfer your data, metadata and processes with our comprehensive framework.

## › **Salesforce custom development**

RSM can help your company build custom applications to support your unique business needs.

## › **Salesforce retained teams**

RSM's highly experienced team of consultants and architects can provide ongoing advisory, administrative and development services within your team.

In addition, RSM offers full customer support for implemented Salesforce software, including a dedicated, retained team of experienced Salesforce consultants who can assist clients with specific resources for a predetermined number of hours a week.

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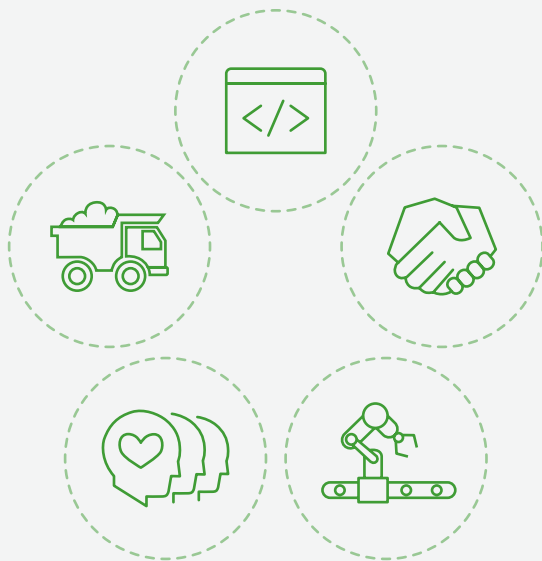
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# Industries served by RSM

RSM has extensive experience implementing Salesforce for customers in more than 20 different industries, each with unique needs and specifications. Here are some of the top industries that RSM serves with Salesforce solutions:



## › **Technology and software**

RSM's consultants work with hundreds of software and high tech organizations, from startups to well-known businesses. RSM provides guidance with software-as-a-service, subscription management, customer portals, complex quoting, configuration of hardware, quote-to-cash and more.

## › **Business and professional services**

RSM's advisors work with numerous BPS clients, from staffing firms to law firms, to get the most out of Salesforce. RSM can help you scale your services business, develop a 360-degree view of your customer, create portals so that your clients can interact with your brand 24-7 and more.

## › **Architecture, engineering and construction (AEC)**

RSM's professionals work with a variety of architecture firms, construction companies and real estate businesses, using Salesforce to help streamline the sales and bidding process, manage contracts, accelerate dispatches in the field, generate invoices onsite and add parts and services as needed.

## › **Manufacturing and distribution**

RSM's Salesforce team advises numerous manufacturing and distribution companies around the world. Whether managing their sales or creating a customized business application to accommodate their growing needs, RSM assists them with new or existing Salesforce solutions. RSM connects the front and back office so that sales, orders and finance are seamlessly connected in order to automate and scale the business.

## › **Nonprofit**

RSM's dedicated nonprofit team has been helping nonprofit organizations for decades to optimize operations and strengthen data intelligence and insights. Salesforce Nonprofit Cloud enables nonprofits to develop stronger relationships, improve fundraising efforts, build membership, deliver services and more. RSM helps nonprofits customize solutions to meet their unique needs and provides solutions within the following sub-verticals of nonprofit:

1. Affiliation & Membership Groups
2. Charities
3. Foundations
4. Social Services
5. Education



# Evaluating Salesforce

Migrating to a new platform is an important step for any organization and rarely a decision that should be made in isolation, given the interconnectedness of processes and systems. Every important system participates in an overall process, such as lead-to-order or order-to-cash, and the more seamless the process, the more the system can be automated and scaled. Just as important, each system collects valuable customer information that's part of a larger 360-degree view of the customer. From there, insights can be gained and processes can be automated to grow the success of those customers with your business.

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# HERE ARE SOME FACTORS TO CONSIDER



## CLOUD-BASED SOLUTION

While cloud-based solutions require configuration, they can be implemented relatively quickly and cost less than on-premises solutions. A phased approach may have more costs, as it may be necessary to do more integration work—but cloud solutions are designed to be flexible, and APIs enable interoperability.

## FULL SUITE OF TOOLS

Salesforce offers a suite of solutions that can be purchased individually or together to form a multi-cloud environment. The big advantage of a platform is that data is consolidated in one layer—and the growth, support and administration of the platform become less expensive with the economics of scale and scope. With cloud solutions, procuring a software solution is easy to do and can be done in phases as part of a larger road map. There is sometimes a tradeoff between “best of breed” products and the benefits of a platform or suite, but many of Salesforce's products happen to be at the top of each of their categories.



## UPGRADEABILITY

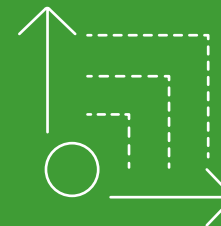
This refers to how often the vendor provides updates to the software and how easy those upgrades are to implement. Salesforce offers seasonal updates—spring, summer and winter—delivered in real time and requiring only five minutes of scheduled maintenance time.

These upgrades happen automatically on specific dates that are published up to a year in advance on the Salesforce Trust website. Updates are all in the cloud, too, so there is no need to upgrade hardware or software.


## PLATFORM TRAJECTORY

When adopting any new software, you'll want to evaluate where the software and vendor are headed. Is the company making significant investments in its platform to improve its solutions? Is the company adapting and evolving its software to adjust to continually changing market factors? Or is it staying static, remaining the same technology it was six months or a year ago—or longer? As noted, Salesforce makes three seasonal updates every year, delivering hundreds of innovative features and upgrades. Salesforce is a market leader in almost every software solution category—the company is always

listening to its customers and improving its platform.







# Choosing an implementation partner

Finding the right implementation partner is as important as finding the right software—a good partner can save you a lot of time, money and unnecessary difficulty. Moreover, a good partner can also help your company maximize the value of using Salesforce both now and in the long term. Thus, it's essential to find a partner who has significant in-house implementation experience and understands your organization's business needs, challenges, goals and industry well enough to align Salesforce with your business.

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# HERE ARE SOME FACTORS TO CONSIDER



## BREADTH AND DEPTH OF EXPERIENCE

Ensure that your consulting partner is able to provide a full solution; many smaller organizations may design a siloed solution, which could negatively impact your team's efficiency and data. RSM's breadth and depth of experience is unique. RSM doesn't simply have Salesforce advisors who technically install the product; we have thousands of team members around the world who specialize in all aspects of business—from finance and legal to tax and consulting. We can leverage years of experience in any industry, and we bring that cross-company involvement to each and every customer. Our diverse backgrounds allow us to break silos and provide complete business support that far exceeds a technical implementation.

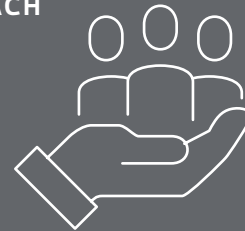
## VENDOR SIZE

Your consulting partner should be the right size for your organization. Smaller vendors may not be able to support your needs today or in the future; large vendors may have outsized pricing—and might not be nimble enough for your needs. As the leading Salesforce partner for middle market companies, RSM serves a wider range of needs.



## CLIENT-CENTRIC APPROACH

RSM takes a client-centric approach to all of our project engagements. We believe it's critical to fully understand your business, goals and challenges prior to implementing Salesforce so that we can tailor the platform to your needs and help you maximize its full value. Additionally, RSM works with clients for the long term, providing full-service support and partnership. We can help your company implement Salesforce, but we can also assist with any ongoing needs that your company may have afterward, such as managing, maintaining or optimizing the platform.



## STRONG TRACK RECORD

A good consulting partner needs to understand how to deliver technology that is aligned to the business, so you'll want to ensure that your vendor has a strong track record of delivering not just technology value, but also business value. Starting from either an assessment or discovery process, RSM draws upon experience and best practices to align with your business strategy so that the technology implementation fully meets your business goals.

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# RSM's Salesforce excellence and customer satisfaction

Salesforce measures and ranks the technical knowledge, project experience and customer success of all its consulting partners through its Navigator Program. Consequently, Salesforce has recognized RSM as a top-tier partner, with RSM earning elite Summit level.

RSM strives to provide the best client experience possible with every engagement. Customer satisfaction is top of mind from the first call we have with your company all the way through implementation, solution success and post-launch support. In fact, our reviews and expertise are visible on the [Salesforce AppExchange](#), which is available for everyone to see.



# Salesforce has awarded RSM 17 badges (to date) for its consulting excellence.

## INDUSTRY SPECIALIZATIONS



Affiliation & Membership Groups



Business Services



Communications Equipment



Nonprofit - Other



Software & Services

## PRODUCT SPECIALIZATIONS



CPQ



Experience Cloud



Integration Services



AppBuilder



Platform



Process Automation



Security & Privacy



Service Contact Center



Tableau Content



Tableau Platform



Sales Cloud



Service Cloud

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# RSM's Salesforce CSAT score: 4.9/5

We value all of our partner relationships and stand behind all of the work we do.

Here are a few of our Salesforce clients in their own words:

“ We would not be successful without our partners on the RSM team. The mindset is always that we are one team together making Kymeta successful in Salesforce. ”

**ALISA GARCIA**, Senior Director of Sales Operations, Kymeta

“ RSM has been able to help us scope our projects, optimize our current processes, set guiding principles and align us to best practices while still understanding the nuances of our business. It is a true partnership that has made our projects successful. ”

**MINDY FIELDS**, VP of Sales Operations, LastPass

“ I am very satisfied with RSM. I had a great time working with the team, and they provided great support during the project and post-implementation support. It was an excellent experience all around. ”

**BEN POIRIER**, Enterprise Systems Specialist, CrossFit



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# How to buy RSM's Salesforce solutions and services

RSM believes in a business-first approach—understanding the strategic and business operational goals that will drive the technology decisions. Many organizations elect to start with an assessment to examine current state, understand and refine business goals and put together a plan of execution.

RSM does not resell Salesforce licenses but is happy to collaborate with you and Salesforce on licensing.



# Conclusion

As the world's #1 CRM platform, Salesforce has transformed the customer experience and the way companies approach it. Salesforce solutions have streamlined communication between teams and united them all with a single source of truth that an entire enterprise can leverage. Salesforce is a sales force, and if you're not taking advantage of it, your competition almost certainly is.

As the leading Salesforce partner for middle market companies, RSM's advisors have deep experience in all Salesforce solutions. When your company works with RSM, we'll not only guide you through a Salesforce implementation, but also help your company make the most of the investment you've made in Salesforce. We're proud to be the first-choice advisor to the middle market and proud to provide you with the power of being understood.

To speak with a member of RSM's Salesforce team, contact us at 800.274.3978 or visit [rsmus.com/contact](https://rsmus.com/contact) to send us a message.

**CONTACT US**

Contact RSM today to get a free health check of your existing Salesforce install.



**+1 800 274 3978**  
**rsmus.com**

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