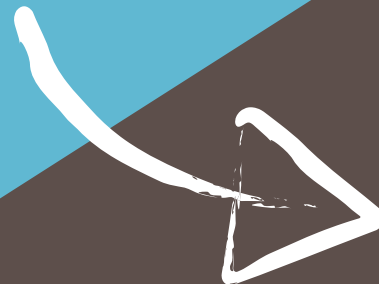


A Desynit guide

How to make **Salesforce** work for your business



Welcome to the Kingdom of Salesforce

In the beginning there were typewriters, pigeonholes, and memos. Businesses operated to the sounds of the return key and the rustle of reams of papers.

The first of the big business system empires was born in 1981 when Bill Gates and Microsoft shared a vision – a PC on every desk, software for everyone and universal access for all.

Never mind that it was the same business systems for everyone, and one size had to fit all – Microsoft's empire started to grow. The world liked the new vision more than typewriters, pigeonholes and memos.

The kingdom of Oracle threatened, yet still Microsoft ruled supreme.

But the world of business systems moved on and more contenders fought for the throne. In the early 1990s brave young start up Netscape started speaking about a 'web browser' replacing an operating system like Windows. Amazon and Yahoo were introducing a new web based way of life to customers, and the winds of change blew stronger.

In 1998 Marc Benioff, a knight from Oracle had a momentous dream. The vision came to him in his sleep – a tabbed browser. This was the beginning of Software as a Service (SAAS). Can you imagine a world without it now?

ZZZ

ZZZ

ZZZ

“



The vision came to Marc Benioff in his sleep – a tabbed browser.

”



And so it came to pass, from his rented apartment in San Francisco in 1999, Benioff started the outlying principality of Salesforce, with the goal of making enterprise software as easy to use as a website and available to all.

In the new kingdom of Salesforce, business systems would be:

-  **Democratic**
-  **No Installation**
-  **No maintenance**
-  **Regular upgrades**
-  **Pay-per-user**
-  **Accessible from any mobile device**

The kingdom grew and grew. From this original simple dream, an incredible system has developed. The basic foundations hold firm, but it has become more complex.

The AppExchange is the fastest growing region of the kingdom, engineering powerful thinking into applications that can sharpen business operations. Technological speed of change is such that the systems can offer more and more to individual businesses. In the kingdom of Salesforce the system fits you; you don't have to pigeon hole yourself into a system.

One size no longer fits all.

You can be master in this incredible Kingdom, with all the wonders it has to offer, but to make the most of its riches you need a guide. A guide who has surveyed the entire land, and who understands the terrain. Someone who understands your business and the pinnacles you need to reach. A mentor who can accompany you along the smoothest and most profitable routes until you can safely set up camp and make the Salesforce Kingdom your own.

“

The kingdom grew and grew. From this original simple dream, an incredible system has developed.

”

**Let us be your guide.
Welcome to the
Kingdom of Salesforce.**



Harnessing the power of Salesforce



The transformative power of good systems is vast – speeding up processes, improving communication, removing obstacles and getting you to your objectives fast. No doubt about it, Salesforce is a great system. This cloud-based CRM can turbo-charge your business and make a real difference to the working lives of your team. When powerful technology like this works as it should your people are free to do what they do best. Targets are met, goals are reached, revenue builds and working life is good.

We've witnessed the transformative and freeing effects of Salesforce first hand here at Desynit. It is the tool we choose to use to manage our customers' experience. For a small, growing business like ours Salesforce is an investment – one that we didn't take

lightly. It has more than paid off. With careful thinking and tailoring we've seen a gratifying increase in lead volumes, conversion rates, win rates, revenues and customer retention. And it has freed up a lot of our precious time too.

Getting Salesforce to work the way YOU want it to is a challenge.

Desynit is a Salesforce integrator and partner. We've helped many companies large and small make Salesforce work in their businesses and we want to share with you some of the things we've learned along the way. Our aim is to show you how to harness the power of Salesforce, so you can make it work like you know it should for your business.

“

When powerful technology like this works as it should, your people are free to do what they do best.

”

What can Salesforce do for your business?



Let's start with a quick recap. What's the point of Salesforce in the first place? What is it exactly, and what benefits can it deliver?

Salesforce is a CRM – helping you create and manage great customer experiences.

Every day, you have conversations with customers and prospects about your company and products. Customer relationship management (CRM) is the set of business processes and underlying applications that helps manage all your customer information, activities, and conversations. With CRM, your sales, marketing, and customer service teams can understand every customer and deliver the right message or answer. By analysing this information, you can make better decisions to close more business, reduce the

cost of service, and keep every customer satisfied.

A CRM in the cloud – your team can use it anywhere.

CRM is shifting toward cloud computing. Instead of buying and maintaining expensive servers and software to manage customer conversations and information, companies can use Web-based ("cloud") applications to run their CRM – and get a high return on their investment. Salesforce.com is a leader in cloud computing, offering a complete set of CRM cloud applications, a cloud platform, and a cloud infrastructure.

CRM cloud apps need to be easy to use for sales, marketing, and service professionals in any industry.

Salesforce gives you complete freedom to customise the CRM for your business. It's the best way to boost adoption and make sure your CRM apps are working the way you do.

More than a CRM – a customisable platform for all that you do.

Salesforce.com is not just a CRM; it's a cloud-based platform – a complete IT infrastructure for your business hosted on their servers on top of which you can build bespoke applications to suit your business requirements.

Example

How to use the Salesforce platform & AppExchange to customise your CRM

Your marketing team decides that they would like to run networking events and capture information about attendees. Pre/post events they want to send marketing emails, Tweets and Facebook messages.

They would also like to measure the effectiveness of all these channels in order to justify their budgets. Event management tools that would normally handle all of these channels can be expensive and cumbersome and still not deliver exactly what you need in the format you want.

This is where Salesforce wins every time. You can customise your campaign to work with Facebook, Twitter, Google+ or other. This means you can respond to your guests on the medium they most prefer to use, with no overhead or additional logins for you to remember.

In the example on the left, you may have decided that you want to be able to use Eventbrite to take bookings to your events. Eventbrite are indeed bright and have an app in the AppExchange which is free and does exactly that, no need to reinvent the wheel. There are thousands of free Apps and some highly effective paid apps, like HR management, Time management and many others.





What Salesforce means to your people

For sales managers

Salesforce gives you real-time visibility of your team's activities so you can forecast sales with confidence and report with ease.

For sales reps

Salesforce makes it easy for you to manage customer information so you spend less time handling data and more time with customers for more success.

For marketers

Harness the power of social media and connect with customers in whatever way they choose. Salesforce joins up your content marketing, social media and traditional campaign management activities with a complete marketing automation and social monitoring solution. An integrated experience that extends your company's voice, reaches

new audiences, and builds your customer base.

For customer service

Your customers have questions about your products. Today, they might go to Google or Twitter to look for answers and only contact your call centre if they can't find what they need. To deliver stellar customer service, you need to connect all the conversations that happen on social networks with the internal knowledge your agents use every day. That way, your customers get answers fast and are happy. And it costs you less.

For your business

Better customer management for great customer experiences; with data at your fingertips means you can learn and constantly improve.

Improved efficiency, increased productivity, whether small business or large corporate, Salesforce makes it easier for your business to sell more and grow. A joined up customisable platform for your business so you can make it work like YOU want it to.



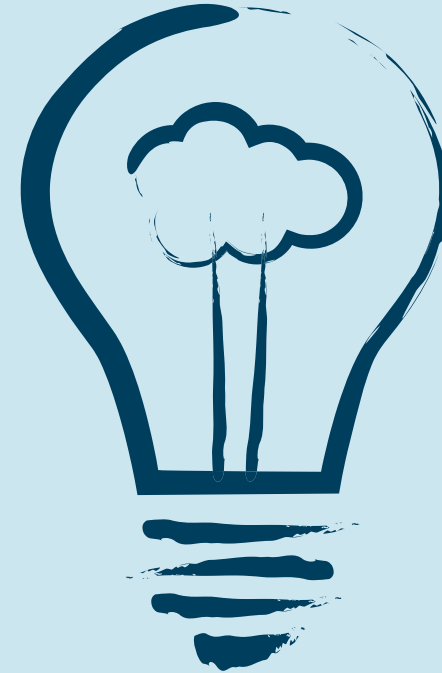
Better customer management for great customer experiences.



12 ideas to make Salesforce work for you

You'll have heard the stories and maybe experienced it first hand – many companies struggle to get value from their CRM systems. Often this is less to do with the CRM system and more to do with the way it has been set up, implemented and managed.

Salesforce is a transformative system, but success is all in the implementation. If you want to get real value from your investment in Salesforce then take a deep breath and focus on these twelve things.



- ▶ **Plan**
- ▶ **Integrate**
- ▶ **Manage**
- ▶ **Learn**

12 ideas to make Salesforce work for you

Plan

1

Be clear on your objectives and plan.

Take time to consider your objectives and what would make it easier for you to achieve these goals. This will help you to prioritise what you need in your system. Know the 'From' and the 'To' you want to achieve – like any change, know what you want to achieve. Make a plan and build Salesforce specifically to facilitate its execution. Only then will you get real value for money.

2

Think big, plan big, but implement small.

Salesforce is a very powerful tool with many features – more than a CRM but it can be a CRM. Choose what you want to achieve. Know what's possible, go wide angle and then prioritise. You don't want to overwhelm your team. Keep this focus throughout the project. Do one thing well. Then move on. Small, iterative rollouts are like Xmas presents all year round.

3

Get off to the best start.

The success of Salesforce in your business depends on getting your team to use it, and use it effectively. Getting off to a good start is critical. A Salesforce quick start programme, such as Desynit's Best Start [desynit.com/beststart](https://www.desynit.com/beststart) – which includes the uploading of all your business information – will help you to get started in the right way. Find out more about Desynit's Best Start service here.

“

Forget all the bells and whistles. Instead, make sure you have a few key reports coming from your CRM system.

”

Gene Marks, Forbes.com article
'What Salesforce Won't Tell You'

12 ideas to make Salesforce work for you

Integrate

4

The tool is not what makes your business work – your team is.

Get them to participate in its development and tap into their collective brainpower at no additional costs.

6

When it comes to implementation, the only way is Agile.

The sequential Waterfall approach results in projects that rumble on for years, and are already obsolete before they are unveiled. When it comes to implementing Salesforce in your business, take the Agile approach.

5

Old systems are not bad systems.

Bringing in Salesforce doesn't mean you have to scrap your existing systems and processes. A skillful integration partner will unlock the business knowledge to work in a new way with a modern, cloud-based platform like Salesforce. Think evolution not revolution. However attractive a clean break may appear, it's a high risk, high failure option. Take small steps to change an existing system incrementally for a more robust and cost-effective end result.

7

Work with the right integration partner.

Great results on projects come from great partnerships. Salesforce integration projects demand an understanding of how business works, not just technology. Look for an expert Salesforce partner who can guide you away from trouble and can talk business as well as technology.

12 ideas to make Salesforce work for you

Manage

8

Everything into Salesforce.

If it isn't in Salesforce it doesn't exist. Embrace your CRM – wholeheartedly, and ubiquitously, or not at all. Learn it, engage people in it, train them, and put the work in. Embrace your new Salesforce system (or fail).

“

The most successful CRM systems are at companies where the system is the culture. Do what's necessary to help your people adapt. Give them training and support. But in return require them to use the system. Because if it's not in the system... then it doesn't exist.

”



Gary McGeorge,
Director, Desynit

12 ideas to make Salesforce work for you



Invest in a strong Salesforce administrator.

To succeed nominate a Salesforce champion – part enforcer, part gatekeeper. Not an IT person but a super-user who owns that role, knows the system inside out, takes responsibility for the quality of the data and helps others with Salesforce questions. This will stop the system spiralling out of control and the data getting very messy.

Jenny Bamber is the Systems Administrator here at Desynit. She works for us and our clients, making sure that we all get the best out of our CRM.



I can't imagine my working day without Salesforce. It's so powerful and gives you so much valuable data at your fingertips. My job is make sure everyone uses it to its full potential. Part of my role is to inspire, motivate and reassure – people get used to their own systems and find new ones scary. But I think that if you have a process then it all comes naturally. There isn't a better way to do business and to keep in contact with all your customers.



Jenny Bamber,
Salesforce Administrator,
Desynit

12 ideas to make Salesforce work for you

10

Continually ask if Salesforce could make a task simpler.

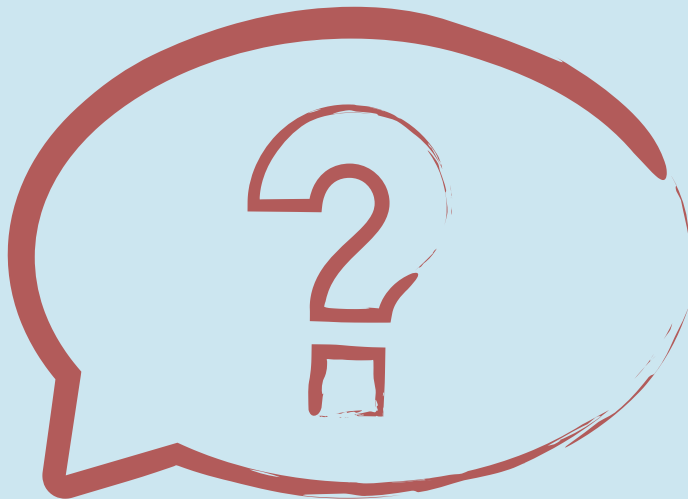
If you are copying or pasting routinely, it could be that a simple script route will automate the process and save you time, effort and money. Bounce ideas off your implementation partner or Salesforce account executive. Develop it over time.

11

Challenge your dependence on Excel spreadsheets.

By building reports and dashboards in Salesforce you are looking at live data as it happens, not data that is out-of-date the second you download it.

Your team can all draw on those same reports and dashboards without your intervention. If your Excel spreadsheet is a monster, consider building a custom application on the force.com platform. You have full access to do this as part of your Salesforce license.



12 ideas to make Salesforce work for you

Learn

12

Learn from others.

Get involved in the Salesforce community and soak up the spirit. Salesforce has spent millions on networking events, product launches and video tutorials.

From Dreamforce, the Customer Company Tour to local Salesforce user groups, Salesforce works hard to support its users and there is much you can learn from them if you get involved.

Meet with other companies who are using the products, try and talk to a cross section of staff using it and gather your own lessons. No implementation is perfect but why make the mistakes others have?



Customer story

Salesforce is a business-wide success for The Retention People



THE RETENTION PEOPLE KEY FACTS

Sector: Customer Experience Management Software and Solutions to the leisure industry

Size: 19

Location: Bath, UK; New York, USA; Canberra, Australia

The challenge

The Retention People is a small business with a big reach — it has a global customer base and locations in the UK, the US and Australia. Providing customer experience management software and solutions to leisure clubs worldwide, this company is the fastest growing business in its sector.

Sales and marketing director, Justin Mendleton, recognised that the company's existing CRM system just could not keep pace with the growth of the business. With teams on three continents, the Salesforce platform was a great choice to allow them to stay connected and work towards shared goals.

Justin needed a system that connected their teams by giving them a single up-to-date view of their sales pipeline and process. The challenge was to get the people and processes at The Retention People up and running on the Salesforce platform in a short space of time.



Customer story **The Retention People**

The solution

Justin sensibly decided to partner with a Salesforce integration expert. The team here at Desynit provided Salesforce expertise up front, helping Justin to ensure that the implementation was a business-wide success. Desynit helped **The Retention People** get going fast with a 'Best Start' Salesforce implementation week.

Up and running in five days

Desynit's Best Start service had **The Retention People** up and running effectively on Salesforce fast. The first step was for Desynit to take time to understand the needs of the team and what they wanted to achieve with the

platform. Desynit could then deliver the best approach. The implementation phase included:

- ▶ Full customisation of fields, page layouts and drop downs to create a seamless and bespoke sales process;
- ▶ The addition of all necessary documentation for easy access during the sales cycle;
- ▶ The removal of all redundant fields to provide a clean, tailor-made and streamlined interface;
- ▶ The uploading of all business contacts and accounts.

“

The platform only becomes real when you are working with your own customer records. That's why we include uploading the customer's data in the **Best Start** weeks we deliver for our clients. In our opinion, this is key to getting a business up and running successfully.

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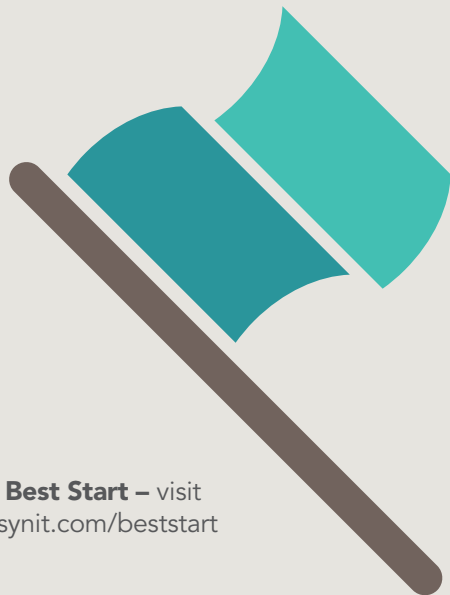


Dorian Sutton,
Salesforce developer,
Desynit

Customer story **The Retention People**

Seamless integration

Once the **Best Start** implementation was in place, the final stage was to spend three days connecting the existing ordering system at The Retention People with Salesforce.



Desynit Best Start – visit
www.desynit.com/beststart

“

There's previously been a **disconnect between systems in the business. One of the things we've done already with Salesforce is that we have an internal online ordering system, and using the team at Desynit, we've hooked that up to Salesforce with our existing internal online ordering system, so the flow of information between the two is seamless. So that saves time for us and our customers.**

”

Justin Mendleton, Sales and Marketing
Director at The Retention Centre

Results

Justin and his team now have a system that has been completely customised to meet their needs – saving them time and presenting them with a clear view of their sales pipeline. In short, the Salesforce implementation has allowed The Retention People to manage their international business more effectively and put their growth plans on a fast track.

Customer story **The Retention People**



One of the challenges of this project was to make it work across three different territories, and that's gone smoothly. We've gone from a situation where we didn't really have great visibility in terms of our sales processes and pipeline, to one in which we have the data we need at our fingertips.



Justin Mendleton, Sales and Marketing
Director at The Retention Centre

What made Justin's project so successful?

Here are a few quick thinking points from The Retention Centre experience.

- ▶ Work with real customer data from the start.
- ▶ Getting buy-in from the staff is critical to the tool's success.
- ▶ Running through your current business processes with a consultant will help you spot all the things you do automatically and have not got documented.

In conclusion

An overview of the Salesforce kingdom

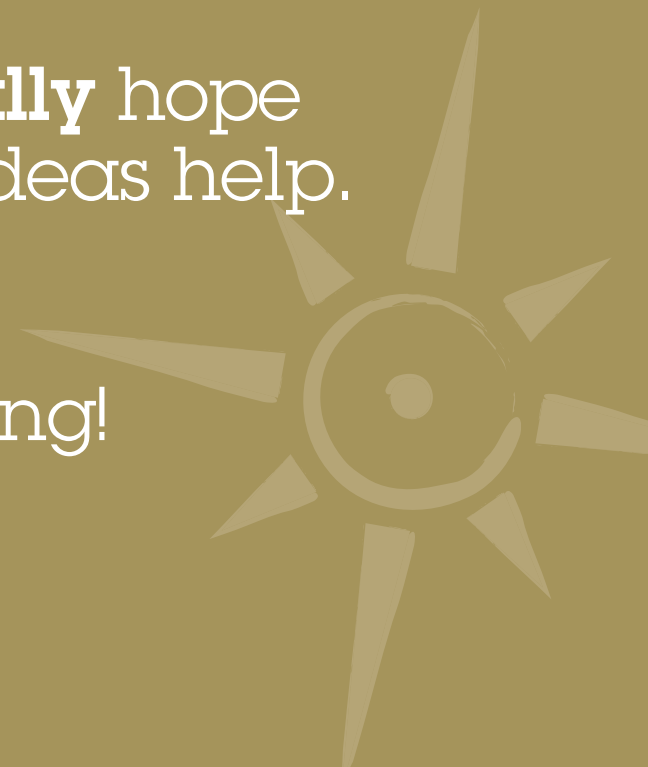
This cloud-based CRM is an investment. It can make a huge difference to your business. Don't invest time, money, and effort, and watch it fail. Make it work for you.

The opportunities for transformation on offer in the kingdom of Salesforce are vast. You need to make the territory your own, make it work the way you want it to in your business.

▷ Good systems really **can** change your life.

▷ We **really** hope these ideas help.

▷ **Happy** travelling!



Looking for help with your Salesforce project?

Desynit would love to help. If you would like to talk to us about your business challenge or Salesforce integration project then we would love to hear from you.



**Get in touch with
Gary McGeorge for a chat at
gary.mcgeorge@desynit.com**

About Desynit

Desynit are systems developers and consultants. We work with businesses that want to free up talented teams by making the most of technology.