



desynit

Digital Transformation on Salesforce for SMBs

A guide to successfully implementing
Salesforce in a small to medium business

Introduction

“ Technology is the biggest story in business today, plain and simple* ”

Digital transformation is without a doubt the great opportunity of our time. Shorthand now for competitive resilience and success, the case has been clearly made for future-proofing your business model with the most up-to-date technology available. It is not just large organisations either; the nature of modern cloud platforms means that digital transformation is just as relevant to SMBs as it is to multinationals.

In summary... it's the biggest story in business today.

So how will you approach it, in your small to medium organisation?

Taking the case study of one thriving UK SMB, Oak Tree Mobility, this is a guide to successful digital transformation for small to medium-sized businesses. Oak Tree Mobility have used their Salesforce implementation as a chance to review the way they run their business, from the ground up. They have forged a digital culture and managed to keep their wider team onboard, engaged and excited about the new drive. The results: great adoption, more efficiency, happier customers and bigger profits.

This is an account of how they did it and the key takeaways that will allow you to replicate their success in your place of work. Digital transformation is an opportunity to be embraced by all, and Salesforce.com is a great choice of platform to make the journey.

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Who's who

A quick guide to the digital transformation key players



Tom Powell
Co-Founder and Director, Oak Tree Mobility



Rick Towler
Co-Founder and Director, Oak Tree Mobility



Josephine Wilson
Head of Digital Marketing, Oak Tree Mobility



Melissa Scull
Online Call Centre Manager, Oak Tree Mobility



Gary McGeorge
Director & Salesforce Consultant, Desynit



Jenny Bamber
Salesforce Administrator, Desynit



Sam McPartlan
Project Manager, Desynit

The Oak Tree Mobility Story



“

Mighty oaks
from little
acorns
grow

”



Oak Tree Mobility Key Facts:

Sector: Mobility products retailing

Size: 150+

Location: Bristol

When Tom Powell and Rick Towler began their retail business Oak Tree Mobility in 2008, they literally were the business: The two co-founders and directors did everything themselves, from placing ads and taking sales calls, to delivering the furniture to the customers in the back of their own cars.

Just 6 years later business was booming: the guys were by now working with their team of over 100 staff to manage a growing product line. Their simple but effective business plan was to continue to deliver great customer service and high quality mobility furniture products: **but the problem was, their technology systems had not grown with the business and now their IT was starting to hold them back.**

After a brief foray into building their own bespoke software system in-house ended in disappointment, Tom and Rick took the lessons and re-thought their approach.

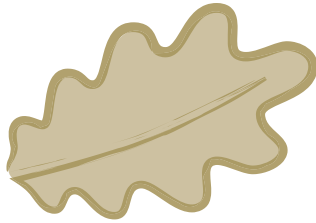
The turning point came, however, when the guys went along to the Salesforce World Tour London. Suddenly the future became very clear – the solutions they were looking for were all on this cutting edge technology platform.

Oak Tree Mobility worked with expert Salesforce consultancy, Desynit, to build the technology framework they needed in just a matter of months. With a three phased delivery plan, the teams worked together to configure and roll out a system that put the Oak Tree Mobility customers first, delivering not just top of the range products, but an excellent service too.

By making their data the beating heart of business, the platform was configured to deliver a seamless experience, from marketing, to sales, to delivery, to billing. Not only have the customers felt the benefit in terms of the sales and service, but the Oak Tree Mobility team as a whole have seen their working lives revolutionised: With data at their fingertips relating to every aspect of their operation, they now have the visibility they need to make radical improvements to the way they work with real confidence.

“Before we had Salesforce, I couldn't trust any of the data but now I know exactly what's going on. I have complete visibility across the business, live, right on my phone.”

**Tom Powell, Director and Co-founder,
Oak Tree Mobility**



Preparing for Digital Transformation

Pick your platform

Before committing to one technology platform to power your transformation, here are three pointers for doing your research on which direction is right for your organisation.

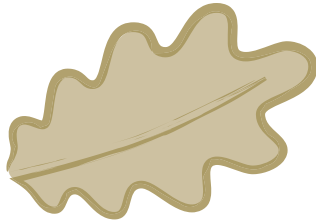
1. Take a look at what other businesses are doing

Talking to businesses similar to your own is a great place to start gathering information. Using your existing network as a starting point, there will be much to learn simply by talking to as many people as possible who have gone through the process. Beyond your network, the Salesforce World Tour London event is a fantastic showcase for hearing other businesses' case studies. Closer to home, if you want to meet organisations in your area using the platform, try attending a Salesforce User Group.

'When I saw how businesses were using the platform, and the results they were seeing, I was sold.'

It was a combination of these three information sources that led Tom Powell to conclude that Salesforce was the right technology for Oak Tree Mobility.





Preparing for Digital Transformation



2. Think about your main business purpose

Although Oak Tree Mobility is a furniture retailer, Tom's key insight was that they needed to move away from a product mindset: in fact it was great customer service that lay at the heart of their business success. To offer the best possible experience to their client base, their prime differentiator would be managing that customer data to drive stellar service-levels.

'First and foremost, what we do is customer relationship management, so we needed a system that enabled us to excel at that.'

Think carefully about what drives your organisation and go for a platform that specialising in delivering on this business model.

3. Start talking to the experts early

Choosing an implementation partner is both a science and an art: they need to have the right skill set and experience, but the chemistry needs to be good too. Making a final choice can take some time, but it's also an excellent opportunity to get some free insights and advice on the digital options available to you. The sooner you begin this process, the more you will learn and the better the outcome.

Real life results

The digital transformation of an organisation will affect everyone. The good news is that people in all departments can fall in love with Salesforce. As well as being a great tool for the leadership team, the platform should also be helping on an individual level, allowing everyone to work and perform more effectively.

Here are a few examples from different departments across the Oak Tree Mobility team.

“ **Melissa Scull**, Online Call Centre Manager, loves Salesforce because ...

Reports that would have taken me hours to compile previously, I can now produce in 10 minutes. Because the presentation in dashboards and reports is so much more visual, it's much easier to understand and present.

Performance monitoring across the team has been revolutionised, we just sit down with the stats and look at what's been happening. I can manage my team more effectively now.

”



“ **Maddy Buchanan**, Offline Media Specialist, loves Salesforce because ...

I manage all of the advertisements that Oak Tree Mobility run in the print media. Now all the results from these ad campaigns are recorded directly into Salesforce against campaigns, so I can see the ROI on any ad we run, straightaway.

We've always had a lot of data, it was just in different places! Before we had Salesforce.com, I had to jump around to different places to find the information I needed. Now I have all the business information I rely on in one tab, and I can access it whenever and wherever I need it.

All of this means that I can be much more strategic and efficient in the way I plan our media, and as a result are our ad campaigns are more profitable.

I'm a big fan of Salesforce.

”

“ **Josephine Wilson**, Head of Digital Marketing, loves Salesforce because ...

With all the data being available to everyone, there is such great transparency between teams and this has really enhanced our communication. Because Salesforce has been configured for ease of use, we can all feel the benefits, particularly in terms of data analysis. All of this helps develop the business.

”



Working with a Salesforce partner

So you've chosen to go with Salesforce as your technology for business (great choice). But you still have another important decision to make – who will handle the implementation for you?

We asked business owner, Tom Powell to offer some following valuable advice on how to get the right consulting partner to deliver on your digital transformation requirements.

1. Don't try DIY

“Don't mess around trying to build your own systems!”

This is probably the most hard-won bit of advice for any business. It may seem like a good option to build a bespoke system in-house, designed to fit your exact requirements. However, your requirements move on, and so does technology.

That's why a cloud platform such as Salesforce delivers: All the system maintenance and upgrades come as part of the deal. And this means you have a secure foundation and all the building blocks you need to build your bespoke system.

You may be tempted again at this point to consider configuring your system yourself. The fact is, however, that you will see much better ROI on your licence fees if you bring in a specialist and get it right first time.



Working with a Salesforce partner

2. Engage an experienced partner... and engage early

“My best piece of advice for a successful implementation is to engage an experienced partner and engage early.”

Don't leave it to the last minute to start talking to your implementation partner e.g. the point where all the decisions have been made. Guidance early on can save you a great deal of time later on in the process.



3. The Salesforce AppExchange is a great place to do your research

The AppExchange is an online directory for businesses operating in the Salesforce ecosystem – that is to say, supplying consulting services or apps. It is the perfect place to do your research. Check out the reviews and the ratings. You should also consider who specialises in your sector, or your type of implementation.

“Go with a partner with a good reputation and a tried and tested implementation method.”

The other important factor to think about is location. If you find face-to-face an important part of mix, then go local.

4. Choose a partner that has done similar projects before

No real explanation needed here - pick a partner who has the sector or technology experience you need, ideally both.

Working with a Salesforce partner

5. Use the partner as a business analyst

“During the requirements gathering process we were able to really dissect what we had in place and analyse our objectives. Gary guided us away from simply using Salesforce to mirror what we already had, but through dialogue, took time to tease out what we could improve.”

Your implementation partner should be working with you on the level of a business analyst as well as a technology specialist. Make sure your partner is prepared to challenge what you think you want (or what you've always done) and offer some alternative, technology-driven solutions which might just be a lot more effective.

6. Make sure you know what the deal is with support

Getting up and running on the Salesforce platform does not end with the 'go live' date as such, but is more a journey of many mini-milestones. There is a point however, when you can safely say you have moved from 'implementation' to 'support'.

Make sure you quiz your prospective partner on what that support looks like on an ongoing basis. Ask about prices, SLAs and how many hours you are entitled to? Do you need 24/7 support, and if so is it available what does it cost? Better to ask these questions at the outset when everything is negotiable.





Jenny Bamber,
Salesforce
Administrator,
Desynit

Top Tip

This is a great time to think about your existing processes and what can be improved. Don't simply try to recreate what you have in Salesforce: use this as an opportunity to come up with ideas on how your business processes can run better.

Gathering Salesforce requirements like a pro

Pinning down requirements is a chance to discuss, define and document what you want to achieve with your platform. This is not a technical exercise, and people from all over the business can play a role in the requirements gathering process.

Daunting? Doesn't need to be. Here are a few pointers:

Who should take part?

Your Salesforce Consulting Partner and your Key Stakeholders e.g Sales Director, Customer Services Team Manager, Customer Insight Manager

How does it work?

Your Salesforce partner will facilitate a workshop session where the key stakeholders can come along and be guided into specifying what they want from Salesforce. This should be articulated in the form of 'stories' e.g.

"I want to be able to see my sales pipeline clearly and how much sales revenue we are likely to close that month"

Your Salesforce consultant will (gently) cross question the participants to make sure that they have fully and accurately expressed what they need. All of these stories will be documented. It is from these stories that your Salesforce Project Manager will build a truly robust requirements document for all parties to sign off on.

How long does it take?

This really all depends on the number of stakeholders and the complexity of the project. In the case of Oak Tree Mobility, we set aside a day for the initial workshop.

One final word on requirements gathering:
It's important to know where you want to get to but the journey can take a number of different routes ... which leads us neatly on to Agile.



Sam McPartlan,
Project Manager,
Desynit

Real world Agile

Planning is
just guessing

OK, that's a controversial statement. But here's the thing, you cannot make every single last decision about your software integration project at the start, that's when you have the *least information*.

That's why there is no room for Waterfall in this brave new world of the infinitely customisable technology platform: Get everyone involved, start, adapt, develop, change, and repeat the process until you're there. That's Agile and it's the only sure way to get your systems really performing.

The Salesforce platform is configured to be easily customisable to meet your needs. It's in this way that project teams can quickly undertake discovery and get you a proof of concept to test for yourself. Now that's a good time to make decisions: when you have some real information.

Working together in a continuous cycle of feedback, implementation, testing and feedback means that you get what you want more quickly and the resulting system delivers on requirements.

Less waste, less hassle, better results.
That's our Agile mantra, will you join us?

The 'A' Word

Adoption is everything

So, you've got Salesforce set up. It's been configured to work exactly how you want it to. Congratulations. Now you just need to get your people to use it ...

The good news is that this is entirely achievable, and Oak Tree Mobility's Josephine Wilson can tell the tale. Charged with heading up the adoption of Salesforce across the business, the results have been awesome. Here's how she managed it:

"It's all about communication!"

Simple! OK, so not just any communication, but clear, consistent, frequent and two-way communication with the team, before, during and ongoing the implementation. Here are Josephine's top adoption tips:

Two-way communication

Make sure your people are well informed about what is happening beforehand: What they can expect to see in terms of changes and when it's going to go live. Deliver plenty of demos on the platform, answer questions and listen to requirements.

Trainers you can trust

Training should start before the system goes live. Appoint a member of your internal team as the trainer, and train in small groups. In this way you've got an established relationship and after the session has ended, you have a go-to person in the office.

Rewrite the rule book

Create some bespoke training documentation for your team. You don't need to write a training manual, just the basics your people will want to refer back to frequently until the systems have become second nature.

Keep it real

Use language that your people actually use. Technical jargon is a total turn off, as is business-speak. If you can't explain the 'why' and 'how' clearly, then it's probably not going to happen.



Josephine Wilson, Oak Tree Mobility

Adoption is everything

Different channel, same message

Consistency is really king here. You can change up your delivery channel (Chatter/ small group seminar/ newsletter/ email/ Monday's team meeting etc), but keep the message the same – **We are on Salesforce now.**

Walk the walk

Everyone in the business needs to get onboard, from the top team now. Your directors need to be digital role model here, communicating via Chatter, using the reports and dashboards in Salesforce etc. No more spreadsheets!

Champions for change

You can spread the love a bit more effectively still if you appoint digital champions. Call them Super-Users, call them Salesforce Evangelists – whatever works best for your people – but these guys have a key role to play in spreading awareness and driving adoption.

Create a buzz

And don't forget, **THIS IS EXCITING!** Have a launch party, a digital awards ceremony, a Salesforce champ of the month, whatever it takes to remind everyone that digital transformation is exciting and full of possibility.

Keep it going

You might think you are getting repetitive, but communication for adoption is not a one-time roll out, it's a way of life now. Keep talking, keep listening, keep training, keep celebrating.

And make sure you have access to support when you need it, which leads us neatly to...

Supporting your new system

Making the most of your investment

Going live on the Salesforce platform is a huge milestone. However, this is just the beginning of the journey. The whole point of using this customisable, adaptable technology is that you can continue to change and develop the way you work on it. **In short, ongoing access to Salesforce expertise will allow you to make the most of your licence investment.**

Of course, there are a number of ways that you can support yourself. Your Salesforce partner will have configured your system to be administered via clicks, not bogged down in complex bespoke code. The Salesforce Success Community is a great resource, as is Trailhead.

If you have more than 30 users then it may make sense to think about hiring a full-time Administrator.

The other option would be to consider taking out a support package from your Salesforce implementation partner. This is the team who configured the system for you, they are the people who understand it the best.



BASIC *Lift Off*

Ideal for those just getting off the ground, with Professional Edition (1-10 users)

- 4 hours of Admin Support monthly
- 4 hours of Managed Services monthly
- User management and permissions
- Configuration of standard and custom fields
- Basic reports and dashboards



ADVANTAGE *High Altitude*

Aimed at Professional or Enterprise Edition clients, ready to take it to the next level (10-30 users)

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- 8 hours of Managed Services monthly
- All features from Lift Off plus:
- Workflow and process automation
- Data imports, updates and full backup
- Lightning features readiness assessment



PREMIUM *Stratospheric*

Our stellar plan for Enterprise or Performance Edition clients (up to 100 users)

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- 16 hours of Managed Services monthly
- All features from High Altitude plus:
- Complex customizations
- Full reporting and scheduled analytics
- Dedicated account manager
- Monthly Health check
- Future release recommendations and strategic planning
- Sandbox and release cycle management

What's next?

Would you like to talk to Desynit about bringing Salesforce into your organisation?

We'd love to help. Get in touch with Gary McGeorge for an initial chat.

About Desynit:

A tried and tested registered Salesforce partner with an independent outlook

Desynit help large organisations innovate. This owner-led business was founded in 2000 on the principle that good business technology systems should change your life for the better.

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