Salesforce Sales Cloud:

What You Need to Know About New Installations

Korcomptenz

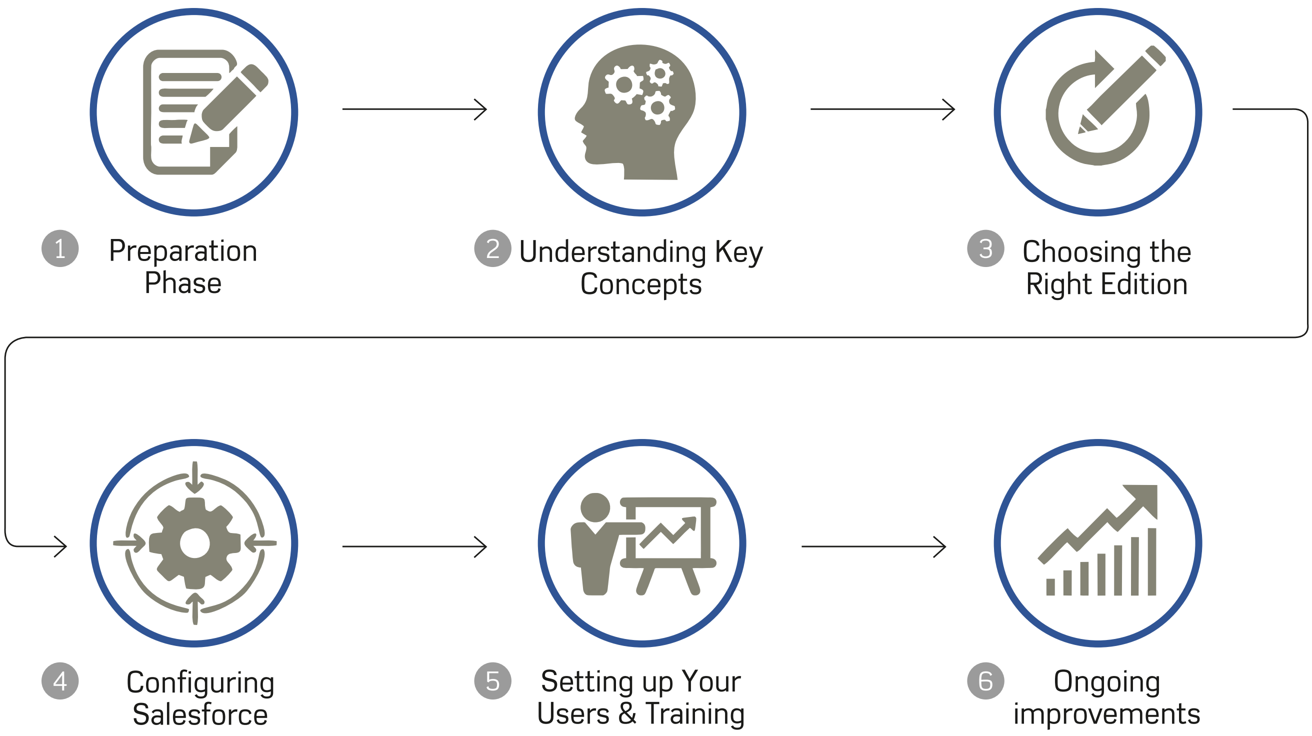
Salesforce offers a range of best-in-class products that can help a business improve their sales, service, marketing, and other aspects of their operations. The platform that started it all back in 1998 is the Sales Cloud, and it remains the most widely used CRM in the world.

The Sales Cloud enables organizations to automate their sales process with features to track leads, contacts, opportunities, and accounts combined with workflows, notifications, and reporting tools to manage your pipeline and customers and prospects. The goal is to make the most of every opportunity, every time to increase your close rate, drive repeat business, improve efficiency and accuracy in the process, and provide new insights for continuous improvement.

To take advantage of all Sales Cloud has to offer, your organization must be aware of several key aspects of the implementation process. This whitepaper focuses on important facts you need to know to get started efficiently and effectively.

Sales Cloud Implementation

Implementing Sales Cloud includes six key steps, including preparing your organization, understanding, key concepts, choosing the right edition, configuring the Salesforce platform, setting up your users and providing training, and putting a process in place for ongoing improvements.



1. Preparation Phase

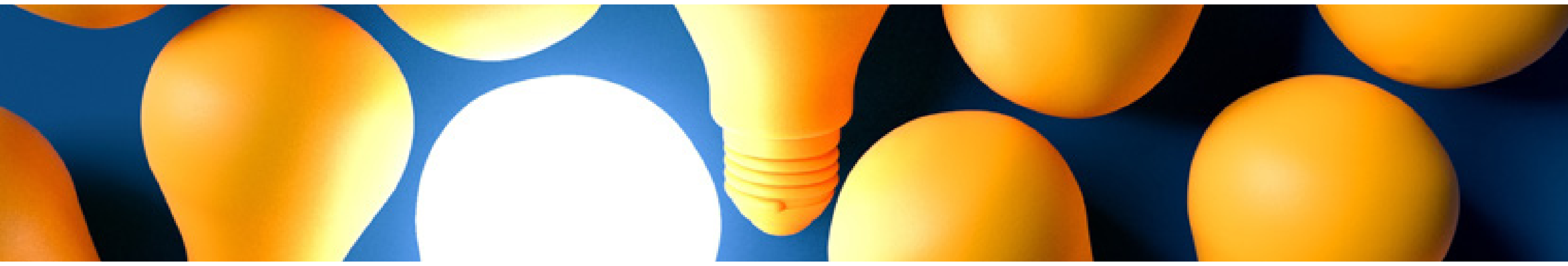
The preparation phase of a Sales Cloud implementation can be the most crucial component of the entire process. The amount of time spent preparing will enable you to plan successfully to unlock the potential in Sales Cloud. To get started successfully, be sure to:

Preparation Task	Rationale
Clearly define your strategic objectives • What are you hoping to achieve in the short and long term? Are you looking to shorten your sales cycle? Improve visibility? • What challenge are you solving by choosing the Sales Cloud? Do you have underserved leads? Missing information?	Sales Cloud is a rich platform that contains hundreds of features and thousands of possible configurations. Successful organizations clearly define their short and long term goals, and implement a strategy that gets that up and running quickly with the opportunity for continuous improvement.
Identify the teams that will be using Sales Cloud	Of course, your sales team are the primary users, but there are also features for management, accounting, or other teams that support the sales process—for example a finance team that approves proposals and contracts.
Confirm the processes that will be managed in Sales Cloud after the initial implementation • Are you using Sales Cloud to capture leads and convert them to opportunities? • Are you also considering managing contracts and other aspects of the relationship?	Sales Cloud includes a wealth of features to manage workflows, notifications, and tasks with approval chains; it is incredibly important to understand what processes will be addressed to make the project successful for your business.

The overall goal for the preparation phase is to ask yourself and your team what you are trying to achieve and how you are planning to achieve it. Are you looking to cut down on the lead conversion cycle? Or improve the connection between your offerings and the pitches that you make to prospects? Clarity on these objectives is essential to ensuring your project remains focused and completed in a reasonable timeframe. You can always add more in the future. In addition, you should also be aware of how you plan to measure your progress towards these objectives. Once you have complete clarity here, you're ready for the next step.

2. Understanding Key Concepts

After the preparation process is complete, you need to understand some key concepts related to Sales Cloud to map the goals you have identified to the structures in Salesforce. Here are a few key concepts to become familiar with:



Accounts

An organization, a company, or an individual that you wish to track in Salesforce. Accounts are generally used as part of a hierarchy to identify people in the same company, family, or other relationship, but can also include competitors and partners in addition to customers.

Contact

A contact can be defined as a person who works at a particular organization or an individual customer. These contacts take the form of a customizable record. Sales Cloud contacts can have details such as the phone numbers, individual titles, as well as the person's role or any other fields you need.

Lead

A lead is any individual that you might do business with in the future. Leads are people who are on your prospect list or who you have spoken to briefly, but do not know enough about them to qualify them officially as an opportunity for a sale.

Opportunity

An opportunity is attached to either a lead, contact, or an account, and describes the potential for a sale. An opportunity is created when a prospect or customer has expressed interest in a specific product or service, and is the key object that leads to the sale.

3. Choosing the Right Edition

Sales Cloud comes in a variety of editions for you to choose from based on the size of your company, the features you need, and your budget. Choosing the right edition is important to ensure you have access to all of the features that will achieve your goals.

There are four major editions of Sales Cloud, including the Essentials Edition, the Professional Edition, the Enterprise Edition, and the Unlimited Edition. Each one of these has unique characteristics, and your business should review them carefully before making a final decision.

– Essentials

Essentials is the most basic edition of Sales Cloud, and it includes an all-in-one sales and support app. Other features of this edition include account and contact management, email integration, and bundling with the Salesforce mobile app.

– Professional

The Professional Edition goes one step ahead of Essentials, allowing you to access certain additional features. These features include lead registration, collaborative forecasting, and rule-based scoring for your leads.

– Enterprise

The Enterprise Edition includes all the benefits offered by the Professional Edition, along with the added advantage of being able to automate your workflows and approvals. This allows your sales team to function in a much smoother manner. It also includes additional environments known as Sandboxes, if you are customizing anything that requires testing prior to going live.

– Unlimited

The Unlimited Edition is the top variant of the Sales Cloud. In addition to the Enterprise features, it also allows your business to access 24X7 support, along with access to configuration services. This round-the-clock support can enable your sales representatives to get their queries addressed at any stage.

4. Configuring Salesforce

The next step of the Sales Cloud implementation process is to configure your user types, and then your lead and account data.

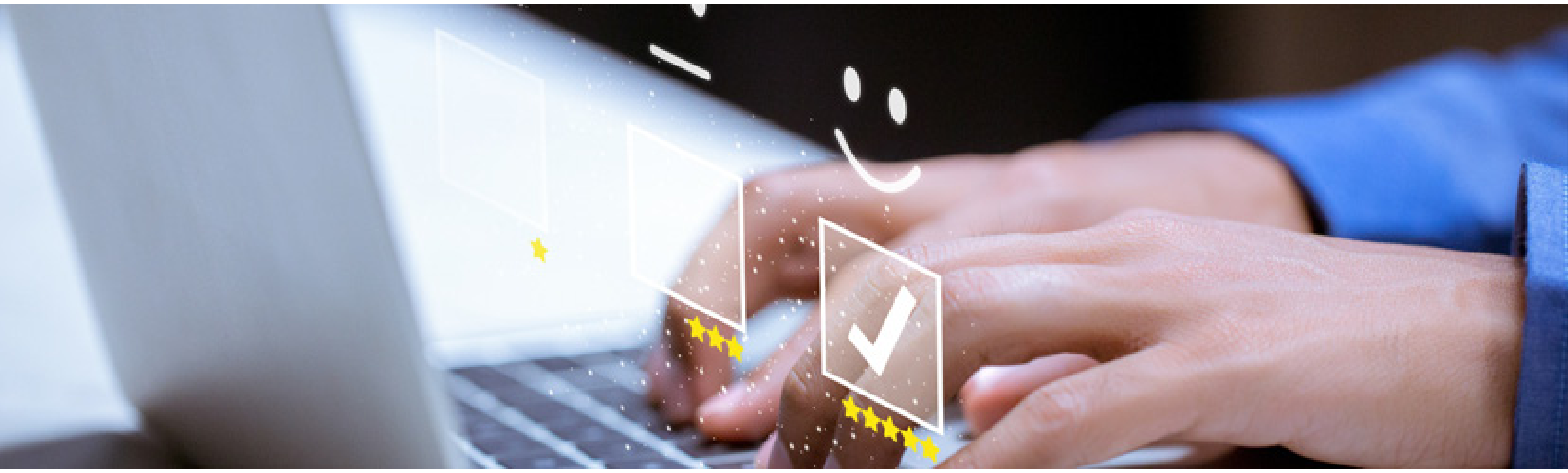
- User types take the form of profiles and roles that determine what features your users have access to and what records they can see. For example, a salesperson might have access to their leads and accounts only, while a sales manager can access all leads and accounts, or a saleperson might be restricted to data in a certain territory.
- Leads, contacts, accounts, and opportunities also have record types. These are used to identify different lines of business or target markets. For example, a company that serves both B2B and B2C might use a different record type for their customers and prospects to segment the data.
- Workflows and notifications are applied to your user types and your lead, contact, account, and opportunity types. They are used to track where a prospect or opportunity is in the process, for example, proposal delivered versus contract issued. They can also be supported by notifications to remind users when work needs to be done.
- Dashboards and reports are created after the remaining items are configured to report on any data in the system. You can show a funnel view indicating where your opportunities are in the pipeline or a bar chart based on the value of your deals, or even a forecast of future performance. You have the flexibility to create charts and graphs that could be used to interpret salesperson performance.

Integrating Your Data

After you have your core items configured, you will need to load or integrate your data. Salesforce offers a number of means to achieve one-time, ongoing, and even real time data integration.

- The Data Loader is used to load data into the system from an Excel spreadsheet. This is the primary means to load your initial leads and customers. The Data Loader can also be set to load data on a scheduled basis.
- The regular or bulk API is used to connect Salesforce to another system in real time or on a scheduled basis. This feature is usually used by developers. Although it can be complicated for a novice, it represents the best way to achieve real time synchronization.

5. Setting Up Your Users and Training



Now it's time to add your users and assign them to their roles and profiles. Remember, the profiles and roles determine what users see and what functions they perform. Therefore, it's important to ensure each user is mapped to the right type.

After your users are added, you are going to want to provide training. Salesforce offers a range of online and offline training options to choose from. You can select the training methodology that is most suited to your business, or if you have an implementation partner like Korcomptenz, they can likely provide training.

It's important to note that the training process for Salesforce can continue even after the implementation phase is complete. This is because Salesforce offers regular updates and improvements to its software and your teams should engage in refresher training courses.

Finally, you should also identify a person or team that will be responsible for providing help and support to your users. This role is generally known as a Salesforce Administrator. If you do not have one on staff, a partner can help.

6. Ongoing Improvements

Your Salesforce Sales Cloud implementation should now be launched, but there's no need to stop there. Salesforce provides so much potential for your business that you should put a plan in place to continually improve and optimize the system.

Recommendations for improvements can come from your users or be generated by management. Successful companies have a team that reviews these recommendations and plans an annual release schedule. Whatever your process, these ongoing improvements and tweaks can go a long way in ensuring that your Sales Cloud experience is optimized.

In Conclusion

This whitepaper is designed to address the key aspects of Sales Cloud implementation. We believe a successful implementation can be achieved by following the six-stage process outlined here.

Your business needs to be prepared for the implementation process beforehand. In addition, your organization must be aware of the key terms and concepts related to Sales Cloud before you choose the most suitable edition and configure it for your business needs.

If you need help, Korcomptenz is an ideal partner for your organization. Our team of experts provide customized implementation solutions that help you make the most of Salesforce. We can also provide ongoing support to your business, so that all your queries are addressed in an efficient manner and Salesforce is kept up to date. In order to find out more about our Sales Cloud implementation services, please contact us.

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