

The Solution Discovery — Salesforce.com

TAKE SALESFORCE.COM TO THE NEXT LEVEL

Many sales and marketing executives that have implemented Salesforce.com are wondering, “What should we do next?” In particular, what are the best enhancements from a sales, marketing or service perspective that will enable organizations to realize more from Salesforce.com?

For many organizations, the first answer is to ensure that they are truly exploiting the software’s core sales force automation (SFA) capabilities for a complete view of their customers, from contacts to accounts, activities and opportunities. Next, many organizations will use Salesforce.com to create a more advanced customer relationship management (CRM) program, typically by extending it to marketing or service, or adding lead management, partner relationship management and other integration capabilities. These needs can often be met by process changes, technology enhancements or one of Salesforce.com’s many partner applications available through the AppExchange. But in other cases, an external software partner, requiring custom integrations into Salesforce.com, may be the best fit.

Some organizations also want to share Salesforce.com data with other enterprise applications—for example, to turn sales opportunities into orders in SAP or Oracle ERP software or tie Salesforce.com to marketing automation software or reporting tools. By default, Salesforce.com data—as with other CRM applications—is not synchronized with other systems, meaning that without integration, critical customer data cannot be easily shared.

Given all of the options, how can organizations identify the best plan for extending Salesforce.com? As a registered and certified Salesforce.com partner and veteran CRM consulting firm, InnoVeer Solutions offers a service to pinpoint the best “next actions” for enhancing existing Salesforce.com capabilities, and to identify the optimal processes, tools and required enhancements. The results after implementing this plan includes increased sales force efficiency, more reliable sales pipelines and forecasts, improved lead management, refined workflows, optimized multi-channel campaign management and more accurate reporting.

MEETING STRATEGIC BUSINESS REQUIREMENTS

The *Salesforce.com Solution Discovery* is an expedited analysis that helps organizations achieve their customer-facing requirements using Salesforce.com. Utilizing its proven Methodology, InnoVeer reviews an organization’s current capabilities against industry best practices, and uncovers modest enhancements that will increase Salesforce.com performance, adoption, reporting, data and tie-ins to other business groups and enterprise applications. Organizations are then able to effectively select the optimal improvements, AppExchange add-on or external tool, and implement business process refinements. The result is improved customer-facing operations, and increased sales, marketing and service effectiveness.

A SUCCESS STORY

Recognizing the importance of creating more mature customer-facing practices, one high-technology company turned to InnoVeer to help achieve more with its existing Salesforce.com implementation. Above all, the organization required better lead management and improved reporting capabilities, to enhance campaign effectiveness, direct partners to the best leads and create a more accurate view of the sales pipeline and forecast.

InnoVeer began by performing a “health check” of the organization’s Salesforce.com implementation, streamlining application-level commands and eliminating redundant workflows, to improve overall performance. Next, after identifying the company’s marketing automation requirements, InnoVeer pinpointed the best software for the job from a shortlist that included Eloqua, ExactTarget, Market2Lead and Vertical Response. InnoVeer then helped the organization integrate the application with Salesforce.com, and create a program for sharing high-quality leads with partners.

To improve reporting, InnoVeer helped the company specify its requirements, and narrow down the available AppExchange tools to find the best fit. Also, the company wanted access to Salesforce.com data via an internal data mart, to apply advanced analytics and generate improved reports. InnoVeer analyzed three leading data integration approaches—integrating via the cloud (using Cast Iron), creating custom Web Services or using a combination of BizTalk and WebMethods—and identified the best technique for meeting the company’s requirements.

Using a phased approach, InnoVeer has helped the company achieve its desired marketing automation, partner relationship management and reporting goals. The company is now studying additional enhancements, to derive further business benefits from its Salesforce.com implementation.

WHAT DOES THE *DISCOVERY* INVOLVE?

The *Salesforce.com Solution Discovery* will focus on the following areas:

- **Performance Tuning** — Conduct a Salesforce.com health check to optimize system performance and refine related business workflows for maximum sales efficiency
- **Data Assessment** — Develop a plan for synchronizing, integrating and streamlining sales data, to ensure that it remains accessible and reliable enterprise-wide
- **Salesforce.com Expansion** — Understand how to extend the software to marketing, service or partner groups, and consolidate disconnected business users
- **Marketing Automation** — Pinpoint the optimal marketing improvements for better campaign and lead management
- **Enhanced Reporting** — Identify optimal AppExchange tools for improved reporting

These activities enable organizations to identify the optimal next steps and enhancements, to realize more from existing Salesforce.com deployments. The recommendations include technical, as well as relevant process and organizational enhancements, that will fast-track companies toward utilizing more of the capabilities built into Salesforce.com, as well as best-in-class AppExchange applications and tie-ins to other enterprise systems.

At a fixed price*, the *Solution Discovery* will develop an action plan for identifying and implementing Salesforce.com enhancements that satisfy critical business requirements. (The fixed price does not include possible travel expenses or additional areas of scope, which are available by request.)

Tangible benefits from the *Solution Discovery* include:

- Prioritizing the strategy for Salesforce.com and AppExchange improvements, including ensuring consensus regarding scope
- Designing a detailed Salesforce.com enhancement or expansion plan matched to organizational needs and business outcomes
- Navigating the complex AppExchange landscape to identify the best-fit solution for business requirements
- Creating a phased approach for acquiring the required technology and refining related business practices

ABOUT INNOVEER SOLUTIONS

Innoveer Solutions, an award-winning CRM consulting firm, provides advanced services to high-technology, life sciences and insurance companies, among others, in the areas of planning and strategy, technology implementation and optimization. The company's deep industry knowledge, broad technical skills and Multishore Methodology enable organizations to address their critical customer-facing issues and achieve an integrated view of all customer information. With an exclusive focus on customer management since 1998, Innoveer has worked with more than 400 organizations to increase their overall business growth, improve internal efficiency and enhance the customer experience.

PAST SALESFORCE.COM CLIENT SUCCESSES INCLUDE:

- Citrix Systems, Inc.
- Genzyme Corporation
- Gordon Brothers
- EveryScope

BUSINESS OUTCOMES:

- Increased sales, marketing and service effectiveness an average of 21%
- Minimized time and effort required to deploy Salesforce.com enhancements
- Improved application performance, scalability and reliability an average of 23%
- Lowered costs, reduced risks and ensured widespread user adoption
- Accelerated AppExchange selection process

CONTACT US:

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