OPTIMISING SALESFORCE

salesforce | **Alchemy** solutions

Call 1300 252 436

PREPARED BY

LUKE STOW

Executive Director Salesforce Services

EDITED BY

PAUL CAON

Chief Executive Officer

OPTIMISE

"THE MEANING OF DIGITAL TRANSFORMATION HAS CHANGED IN THIS NEW WORLD."

Alchemy's 2021 Optimising Salesforce Report provides a detailed analysis, key observations and recommendations to optimise Salesforce by using our Salesforce practice knowledge and experience.

2020 was an incredible "change event" that will forever shape the way in which we engage and connect with each other in every facet of our life. Customer and employee expectations have shifted quickly, radically and permanently in demanding digital, automated and frictionless touch points and engagement.

Empathy, trust and understanding have emerged as the key human elements to low touch, highly engaged and meaningful customer and employee experiences for both B2B and B2C businesses.

The meaning of digital transformation has changed in this new world. Business transformation is now a constant change involving all business stakeholders in iterative cycles. To ignore this change is to risk obsolesce.

We start with a basic premise that it is one thing to have implemented Salesforce however quite another to optimise the use and power of Salesforce to gain the necessary transformational desired change and business benefits.

Most Salesforce implementations are technology focussed implementations driven by large solution integrators who implement a technology solution only without due process, data or, most importantly, human consideration to the initial business problems being solved.

Salesforce, as a business enabler, has a plethora of amazing features and powerful tools which can be hard to unlock if just considered another IT department job to sort out. This approach will never yield the results customers and employees demand.

It is our intention in this report to share our experience and knowledge to explain the pathway required for all businesses who strive for an optimised business Salesforce capability for customers, employees and business prosperity.

UNLOCKING VALUE

"OVER 90% OF SALESFORCE IMPLEMENTATIONS HAVE BEEN DONE WITH A TECHNOLOGY FOCUS AND RENDERED BUSINESSES FRUSTRATED."

To say that we have seen many businesses left frustrated with not being able to unlock business, customer and employee value from Salesforce is an understatement. **This common issue can be solved with focus and the right partner to help unlock every opportunity of value from Salesforce.**

To optimise Salesforce there are some proven focus areas that drive value and help organisations leverage what is one the most powerful business tools of our time.

Over 90% of Salesforce implementations have been done with a technology focus and rendered businesses **FRUSTRATED.**

Our optimisation playbook enables businesses to leverage the capabilities of Salesforce to best suit their business and its models, no matter how big or how small.

Our Salesforce playbook is comprised of:

1. Business Process – drive efficiencies and service models
2. Data – clean and use for insights
3. Usability – make the tool easy
4. Automation – drive low costs to serve, retain and acquire
5. Integration – enable reuse and reliability
6. Delivery – ways of working built for speed and value

WHERE WE'RE AT TODAY

Salesforce is one of the most comprehensive Sales, Service and Marketing platforms on the market and if your business demands a very specific set of features, it might be one of the few or only tools that provides everything you need on a single platform.

You really do have to pay for the privilege though, and the real problem we find with Salesforce is that the convenience of having a single platform and automation suite is negated by poor implementation, neglected adoption, ongoing administration and an interface design that requires customisation.

Of the business people we contacted, in writing this report, **90% of respondents expressed issues with the technical implementation focus their business had taken.**

All those contacted yearned for business ownership of their business Salesforce platform.

Key issues raised, which we will explore in more detail in this report, include:

- poor data quality
- lack of consistent business process
- poor user experience and navigation
- minimal automation
- poor or non-existent integration with other key customer applications and data
- lack of user understanding of the Salesforce platform and it's core capabilities
- IT controls and methods being too slow and creating delivery bottlenecks

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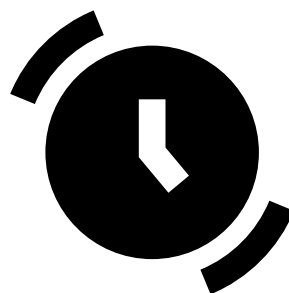
THE 6 THINGS THAT MAKE OR BREAK A SALESFORCE IMPLEMENTATION

Business Process	Data	Usability
Automation	Integration	Delivery Flow

We understand that everyone can use a little assistance to get their Salesforce investment optimised, well organised, and healthy. That is where we come in and partner with you to optimize your Salesforce investment and to help your business better engage your customers and employees.

We are going to breakdown each of these critical aspects of a successful Salesforce implementation.

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BUSINESS PROCESS
CUSTOMER AND EMPLOYEE JOURNEYS

Salesforce is a very intuitive platform however to get the best out of the inbuilt capabilities **business process mapping is a must**. We utilise the principles of lean manufacturing and service design to create customer and employee process maps that will drive business innovation and improvement in the use of Salesforce. We start by understanding your business and business processes before touching Salesforce.

Our business process mapping steps are outlined below:

- Roll out a **self learning continuous improvement model** using our lean six sigma manufacturing methods coupled with service design to provide scaffolding in delivery and business adoption of Salesforce

- Implement **team measurements** to ensure the best metrics are of focus to ensure positive change is facilitated and achieved

- **Process-centric design of digital solutions for customers** to ensure the Voice of the Customer is considered at every stage

- **Utilise proven lean six sigma repeatable process improvement methods and tools** to ensure the implementation can accommodate the agility requirements of the business whilst enabling business benefits at every stage

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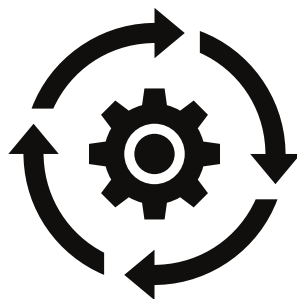
DATA

DATA RICH, INSIGHT POOR

It is necessary to tackle your data health and accuracy to have any chance at optimising your Salesforce and business performance.

Business success depends on accurate, complete data that your team knows they can rely on in making timely decisions. Data quality over time can reduce the benefits of Salesforce as an enabler and cause many business performance issues and inefficiencies in Cost to Serve, Cost to Retain, Cost to Acquire, Churn and general Customer and Employee experience. In addition, leverage the data into meaningful dashboards and reporting that helps you optimise processes and in turn your workforce allocation.

Our approach to data optimisation is outlined below:

- **Analyse the Current State**

- **Remove Duplicate Records and Complete Missing Information**

- **Integrate Third-Party Applications, Technology and Data with Your Records**

- **Build Meaningful Salesforce Dashboards to Help You Run Your Business**

- **Find Leads and Keep Your Data Current and Complete**

Data Maturity is critical for your business and a sustainably successful Salesforce implementation relies on a world class data optimisation approach.
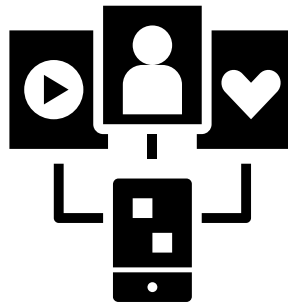
USABILITY
DESIGNED FOR PEOPLE

Salesforce usability is always a hot topic when it comes to optimisation and by reviewing an implementation, talking to customers and employees we can understand immediately if an implementation partner or Salesforce administrator spent any time optimising Salesforce to be intuitive for the people who use it.

Yes, Salesforce has spent a lot of time on out of the box usability however a purpose fit design of usability based on tasks, business processes and industries always works best.

Below we have outlined some of the key considerations we have to ensure a people-centric approach is taken for UX design to enable great usability:

- **Consistency**
- **Standardisation**
- **Intuitive**
- **Efficiency**
- **Collaboration**
- **Flexibility**
- **Insights**
- **Automation**
- **Mobility**

The cost of usability issues can be detrimental to the adoption of Salesforce within your business and good business process and technology change practices will always include changes and modifications to usability.

Remember your employees and customers want a great experience, so it is imperative you connect usability with business process design so that a complete experience can be determined.

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AUTOMATION
REDUCTION OF WASTE

Instead of relying on your employees to perform each part of a business process, automate. The benefits are two-fold: your employees can spend their time on other tasks and you can trust that the process is always completed to a pre-determined standard. Salesforce offers tools to automate several kinds of business processes: guided visual experiences, behind-the-scenes automation, and approval automation. All of these tools are part of the management of ongoing processes and are mostly point and click.

We recommend the following considerations when it comes to automation via Salesforce:

Salesforce provides multiple tools to automate appropriate repetitive business processes: Approvals, Process Builder, Workflow, and Flow Builder.

- **Lightning Flow**

- **Workflow**

- **Approvals**

- **Einstein or Salesforce Industries (Vlocity) Next Best Action**

- **Perform Automated Actions**

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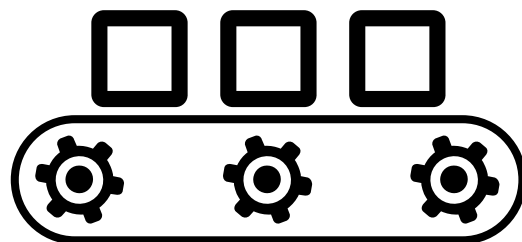
INTEGRATION
MAKE THINGS SIMPLER

In terms of Salesforce integrations when it comes to optimising business processes and data we strongly recommend an Application Programming Interfaces (API) integration approach. The rationale is simple, other methods will not provide the business agility, speed of access to other legacy applications data and finally you will create technical debt that will be time consuming and costly to undo. There are many tools to help with integration depending on your business desire and budget.

We recommend the following high level considerations and activities when it comes to integration with your Salesforce implementation to avoid creating technical debt:

Catalogue the APIs

API's are software intermediaries that allow two applications to talk to each other. Every API is a discrete component that serves as a 'contract' between two agents— providing the data or services (the output) in exchange for a valid input. These discrete components can be consumed individually, or grouped together into a composite application that represents some part of business process (e.g. a transaction), a whole business process (e.g. an order), or a bundle of business processes (e.g. order and shipping).

Continuous Integration

Once you have a business catalogue of API's we recommend starting the move to continuous integration (CI). CI is a development practice that requires developers to integrate code into a shared repository several times a day. Each check-in is then verified by an automated test, allowing teams to detect problems early. APIs are developed to play a specific role— unlocking data from systems, composing data into processes, or delivering a fantastic customer and employee experience.

Salesforce published findings show that organisations that adopt an API-led connectivity approach can deliver projects 3-5x faster and increase team productivity by 300%, compared to other traditional approaches.

The value of API-led integration in optimising Salesforce connectivity is clear.

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DELIVERY FLOW

VALUE AND SPEED TO MARKET

To increase value to customers and employees, the first step in delivery flow, quality and speed is to define an end to end method for delivery suitable for your business that includes **key business stakeholders.**

We recommend designing and connecting each deliverable in the method so that end design, build and experience is as per originating business value descriptions. This is particularly useful in **onshore and offshore model optimization reducing costs and increasing speed of delivery.** Our view of the key deliverables for optimizing this process are:

- **Lean Canvas**
- **Useability Playbook**
- **Backlog**
- **Sprint Plan**
- **Feature Summary**
- **Customer / Employee Journey**
- **Process Map**
- **User Stories**
- **User Interface**

It's common that when businesses first start designing and building on Salesforce, individuals and team members often make changes directly in production. Salesforce is a robust and flexible platform, and you can make changes quickly and easily. But you have to make every change carefully. You're not going to break Salesforce, but you can definitely break your own business customisations.

Reducing this business risk is critical, and process should be developed to strictly limit which changes are made directly into production. Build features in development environments, move them to a test environment for review, and only then move them to production once tested.

This is the safe way to work, however it can be slower unless a continuous delivery (CD) path is taken.

CD builds on top of continuous integration. While continuous integration focuses on sharing work frequently across development teams, continuous delivery focuses on sharing work frequently with customers and employees which requires you to create a delivery pipeline to support your continuous delivery methods.

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TAKE THE RIGHT STEP FORWARD

At Alchemy Solutions, experience is our strength. We are business people who work with Salesforce which means you get people who understand how to get the best out of Salesforce, no matter the industry.

Salesforce Solutions and Services - Australia's predominant Salesforce solutions and services specialists supporting onshore capability right here in Australia.

- Competitive rates when compared in onshore offshore models
- Full service provider across the full Salesforce application offerings
- Experienced and certified professionals
- Optimise your current Salesforce and accelerate business value.
  - Salesforce administration as a service
  - Data cleaning and deduplication
  - Managed services
  - Salesforce health reporting
  - Usability design
  - Architectural services
  - Continuous delivery and Integration services
  - Salesforce reporting clean up
  - Salesforce report creation
  - Salesforce billing and CPQ services

Process Transformation and Automation

- People centered approach to process transformation ensures delivery of the future customer and employee experience
- Automation with Alchemy eliminates repetitive processes.
- We use artificial intelligence (AI), machine learning, and other advanced digital technologies to uncover the full benefits of intelligent automation and robotic process automation.
  - Customer and employee process mapping
  - Process automation
  - Continuous process improvement toolkits
  - Process governance
  - Customer focus groups
  - Service design

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TAKE THE RIGHT STEP FORWARD

We understand that our pricing and market offerings in the Salesforce market needs to be competitive and that's where we are vastly different to óur competitors and the accountancy firms trying to build out technology integration revenues...

Key differences:

- **You don't pay us for Account Management**
- **Optimise delivery flow in onshore offshore delivery models**
- **Buy only what you need with certainty on price**
- **Our lean business model**
- **We have entirely onshore capability**
- **Our certified professionals are industry aligned and experienced**
- **Support locally available 24 x 7 for those who need it**
- **We can be flexible in contract terms**

To demonstrate our competitiveness on price, below are some key points of difference in our Salesforce offerings.

We offer Salesforce capability as a service

Our rates are on average 10% more economical than our competitors

We offer fixed pricing on managed services based on blocks of time

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METRICS MATTER

STAKEHOLDER ALIGNMENT

STILL NOT SURE HOW TO PRESENT YOUR BUSINESS CASE FOR SALESFORCE OPTIMISATION?

HERE ARE SOME OF OUR SUGGESTIONS...

ALIGN TO YOUR BUSINESSES TOP PRIORITIES
Build a business case story board that aligns to your businesses stated goals and priorities.

MEASUREMENT
Start measuring what the current business performance is and look for opportunities to improve those measurements. Look at operational and customer metrics together.

QUANTIFY
Use the KPI's to quantify the benefits and scenario plan for what the optimal outcome would be for your business.

GET US TO DO A SALESFORCE REVIEW
Here, the focus is less on the numbers and more on current state, data, process, actions, prioritization, and goal-setting.
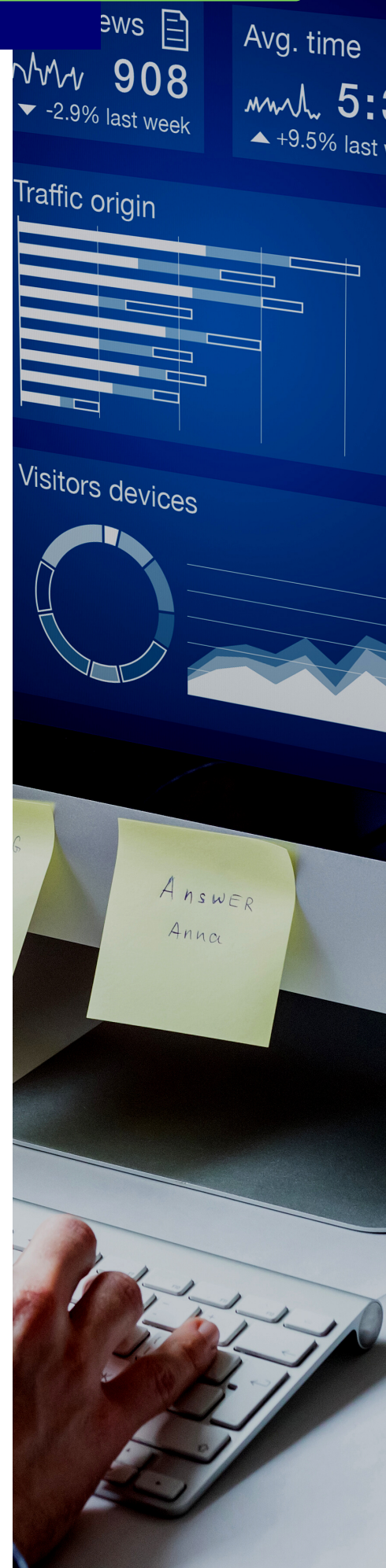
ENGAGE

EXPERIENCE MATTERS

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WE WOULD BE DELIGHTED TO SHARE
FURTHER DETAILS WITH YOU ABOUT HOW
WE CAN PARTNER WITH AND SERVE YOU TO
ENABLE BUSINESS OPTIMISATION OF
SALESFORCE FOR YOUR STAKEHOLDERS.

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LUKE STOW
Executive Director Salesforce Services
M +61 406 593 024
T **1300 252 436**
E luke.stow@alchemysolutions.com.au

PAUL CAON
Chief Executive Officer
M +61 439 462 382
T **1300 252 436**
E pcaon@alchemysolutions.com.au

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