Best Practices for Successful Salesforce® Innovation Projects

Top 10 lessons learned from over 10 years of successful Salesforce deployments.
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Successful Salesforce deployments have the power to substantially improve your brand’s pact with customers, partners and employees. They make it possible to more effectively serve a global customer base and heighten your competitive advantage.

After more than 300 successful Salesforce engagements, we’ve learned what it takes to get it right—the first time. We offer this top-10 list of best practices with the hope that it contributes in some significant way to your company’s success with Salesforce.

1 Insist on Leadership Buy In

Lead by example. If business leaders don’t get actively involved and communicate the importance of the project, nobody else will make an effort or realize the value to be gained. Organizations that do well with Salesforce have strong support and adoption from their leadership team. It helps to give your executives action items and specific ways to encourage adoption by their teams. Prioritizing training and rolling out the system to the leadership team first will drive a culture that says, “if it’s not in Salesforce, it didn’t happen.” Executives should require that data be stored in Salesforce. Using alternate systems to store data or build reports decreases the company’s ROI with Salesforce. To get the performance you expect from your organization managers and executives should use Salesforce regularly to operate the business and demonstrate how an automated process and insight to key data can improve business decisions and drive improved employee engagement and end-to-end customer experience. To increase user adoption, encourage managers to lead their staff meetings using Salesforce application dashboards.

2 Set Expectations and Clear Metrics

It’s a good idea to set expectations right at the beginning—otherwise, you risk losing early implementation advantages such as giving managers improved visibility into the pipeline and more accurate forecasting. Consider having your executive sponsor deliver the projects expectations and metrics training to managers to show them the firm’s executive commitment. Communicate clear metrics to let users, employees and outside participants such as brokers and outside sales know how they’ll be measured and what value they can realize from fully adopting the Salesforce application you are implementing.

Internally, insist that your application have a business owner with strong stakeholder management skills. From the outset, insist that your owner and the user community be supported by a Center of Excellence to maintain and adapt your application over time. This shows the organization that the program is not a passing fad. Insist that the project team achieve speed to market goals with high, measurable levels of user adoption. Set the expectation of releasing a Minimum Viable Product (MVP) followed by getting the company
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3 Invest in the Change

Don’t underestimate the amount of organization change management (OCM) that needs to be planned for and managed to achieve overall success with a Salesforce implementation. Whether your organization is implementing marketing, sales, service, communities or other Salesforce clouds, OCM must be included in the strategy and approach. Stakeholder management, organization alignment, communications, role mapping, skill development, training and adoption all will be critical and will require investment. This is true for users inside and outside the organization, business partners, suppliers, executive leadership and management. Everyone who is impacted by or has interactions with the new solution should be identified through customer/user stories and journeys so that the people, processes and data impacted along these journeys be aligned to the most critical interactions and touchpoints.

4 Make Salesforce Part of Your Business DNA

If you just dip your toes in the water with Salesforce, you’re wasting time. Instead, make a splash and milk the platform for all it’s worth. Insist that leadership and the project team invest the time and effort to truly understand what is possible with the platform. Salesforce is flexible, and thus is specifically designed to accommodate your company’s unique business processes and needs. Salesforce’s usability features foster productivity and efficiency but only when opportunities are maximized by people with an understanding of what is possible. Make Salesforce a key element to your company’s culture and success by implementing the right customizations, integrations, 3rd party AppExchange accelerators, mobile optimizing the user experience and providing Salesforce training to your team. Salesforce is not just for sales, marketing and service. Challenge your organization to also find ways to use Salesforce as a platform for developing your own custom/mobile apps and for integrating Salesforce into mid-office/back-office processes, applications and data.

5 Harmonize Your Processes

Taking your as-is business process and moving it over to Salesforce without changing anything is easy, but it’s not the best way to go. The fact that you’re selecting a new technology and platform makes it the perfect time to update and optimize your processes as well, even processes only 4-5 years old. Chances are, your processes designed 4-5 years ago were not analyzed and designed from the “outside-in” (customer’s point of view), and as a result, these processes and their data probably have little convergence across marketing, sales and service.

Now your business has changed, new guidelines have been enforced, new people and skill sets have entered your organization, and the Salesforce platform has tools and capabilities that you haven’t had access to in the past. Make sure to take the time to identify areas that need improving or can take advantage of additional workflow, collaboration, mobile and real-time reporting. Treat Salesforce as an opportunity to roll out more effective processes that make life easier for users. For example, introduce a new opportunity process that uses the application’s lead functionality to get leads directly from the Web into the application. Hands on training with real world scenarios and data is recommended to get new users accustomed to new processes, application workflow, data, and terminology.
6 Think from the Outside-In, Question Boundaries

While solidifying Salesforce as an internal component of your company’s operation is very important, it is equally important to monitor the external impact it has on your customers. We advise that your customers take on an “outside-in” culture and perspective on how to align processes, people, data and the Salesforce platform around the customer and the end user. Ask questions like...are you providing all the value possible to your customers? Are you doing all you can to drive high levels of satisfaction? If not, what needs to be done for this to be achieved? Historically, what boundaries has your company drawn to define where your processes’ and brand’s responsibilities begin and end. What persistent challenges do customers have upstream and downstream of your brand’s boundaries? In essence, what you’re doing with Salesforce internally should impact what’s happening with your customers. If you’re falling short of this goal, revisit how your Salesforce implementations, processes, people and data can be optimized to serve customers better. Companies effectively using an outside-in lens gain competitive edge. They question past process/brand boundaries and look for ways to simplify customers’ lives upstream and downstream of those limits.

7 Prioritize Integration to Achieve Convergence

Do your teams have a full 360-degree view of your customer? Is your organization, its processes and its data converged across marketing, sales and service? Are your customer management systems integrated to your quoting, pricing, proposal, order management and fulfillment systems? It will be difficult to achieve success without integrated systems and convergence. Often, data sits in disparate systems used by different departments. This often makes it difficult to discern which data should be considered the “source of truth.” Your teams may also be entering the same data into multiple systems, which undoubtedly decreases productivity and efficiency. Remember, Salesforce has an open API, which makes it possible to integrate just about anything. Seize this opportunity.

8 Make it EASY for Users to See the Value and Adopt

Well, that’s the goal at least. Despite Salesforce’s continuous investments to improve usability of its platform by business people, to some business users Salesforce can still appear very “techie.” And for many people, that word alone stirs up bad vibes. Regardless of what changes you make to your business using Salesforce, they must have clear and concise processes: processes that people are willing to adopt, understand, and respect because they are easy. Yet they must be effective enough to make everyone’s lives simpler. If the system is too complex, or processes are unclear, low user adoption will limit the project’s ROI. User teams won’t trust that the data is accurate or meaningful, which in turn has a negative impact on the way managers compile reports to help them make business decisions. Make customers’ and users’ lives easier to maximize adoption and project KPIs.

9 Start with an MVP, Plan for Multiple Releases & Continuous Improvement

For new application projects, start with a MVP (Minimum Viable Product) followed by quick, iterative releases each with a clearly communicated ROI. For more mature Salesforce applications, establish a process to take advantage of Salesforce’s spring, summer and winter releases. With these releases come enhancements, fixes and new features that can make your Salesforce applications better. These releases are not voluntary and are pushed out on a schedule. To best prepare for these releases you should obtain the release notes as soon as they come out, evaluate each change to understand and manage the risk, and then test and document accordingly. Having
documentation that is not up to date with the latest Salesforce release will take you out of compliance if there’s a release element that your organization has not proven to work as expected.

Establish a culture of continuous improvement with the Salesforce platform and customer success at the center. Evaluate internal and external results with Salesforce to discover what can still be made better. There is always room for improvement. Embrace a set approach to process improvement, stepping through each part of the operation so everyone is on the same page. When doing this, we recommend taking a full 360-degree view of your customer lifecycle from lead to cash. This includes reviewing how you generate leads, marketing and nurturing, converting leads to sales, delivering to customers, providing customer support and service through various channels, cross-selling and upselling, invoicing customers and collecting cash from your customer.

10 Load Your Salesforce App with Value-But Keep It Simple

While Salesforce contains flexible out-of-the-box functionality that allows for sophisticated scalability we always recommend careful consideration before clients build customizations on the platform. A trap that we see clients often fall into happens in the iterative waves of discovery. Users often describe their needs in terms of how s/he wants the system to work, rather than focus on the objective that s/he or a customer needs to achieve. Left unchecked, this pattern leads configuration/design teams down the path of a custom design when it’s not necessarily warranted. Project managers must consistently steer user conversations towards goals and desires versus functionality, thus allowing the configuration/design teams time to reflect on the best method for reaching the users’ goals.

Remember, over customization drives higher user training, maintenance and support costs, limits a company’s ability to take advantage of future upgrades, limits re-usability of the application in other parts of the organization and increases the total cost of deployment. To avoid this trap, we recommend companies use an agile project discovery approach and visualization techniques to quickly align stakeholders around outcomes. Doing this focuses business and IT collaboration on the customer experience and operational goals that need to be achieved.

We sincerely hope this top 10 list has provoked some fresh and challenging ideas for you to bring to your organization. Or perhaps, it has simply reminded you to apply some forgotten best practices that you already know. Either way, your success is our mission. If you want to learn more about PolSource, please visit us at www.polsource.com.