How PwC realized measurable business value with Salesforce

PwC’s digital transformation road map

In 2016, PwC set out to establish a new working environment that supported new ways of working across our entire global organization — an investment that’s realized powerful, quantifiable business value.

All front office transformations have the potential to transform the business. However, a jarring 70% of them fail to do so.1 So as a tool for those of you just starting out on your journey, we wanted to share the method that allowed us to achieve real results.

The business case

Succeeding on our journey began with understanding our destination: what were we trying to do, and how? In other words, what was the business case? Well, we had one overarching goal: grow the company, by employing tools and skill sets that would drive new ways of working. To that end, we developed five methods:

1. Understand the business: have a one stop shop for opportunity, activity, and competitor tracking to increase business visibility throughout the firm.
2. Leverage relationships: understand who knows whom and when roles change, to serve the right client at the right time.
3. Enhance collaboration: bring the best of the firm together to get our clients the right resources.
4. Drive insight: increase in-app reporting capabilities and provide actionable insight.
5. Automate the mundane: streamline repetitive, low-value or mission-critical tasks to increase team productivity.

As the world’s #1 CRM, Salesforce was strongly positioned to drive consistency across our complex, global network of firms, while providing the flexibility needed in certain regions. So selecting our platform was the easy part. Of course, we knew what the hard part would be — because the numbers show most front office transformations fail due to lack of adoption and behavioral change.

Engaging our people

Yes, it’s people that make or break the initiative. So we knew we had to create a movement to get our teams to change the way they worked and embrace the vision. With that in mind, we set five guidelines to support adoption:

1. Account for different workforce profiles. Organizations have up to five generations working side-by-side, all with different levels of digital know-how and adaptability.
2. Engage leaders. Lack of leadership buy-in is one of the most common failure points for transformation journeys.
3. Deliver a thoughtful user experience. Meeting user expectations for user experience is critical, as is automating mundane tasks to make more time for fulfilling, high-value activities.
4. Rethink training. Built-in walk-throughs and tips are a must— but so is investing in unconventional, immersive training sessions infused with gamification.
5. Aim for progress, not perfection. The process is a permanent work in progress — metrics must be kept up-to date and data leveraged to make continuous improvements.

1 Source: Forrester, 2017
The proof is in performance

So how would we know if our investment had paid off? We collaborated with Salesforce’s Business Value Services team and formulated a strategy to get the answer. We identified what we called our “Trailblazers,” and created a matrix of metrics through which to track them. Who were our Trailblazers? They were the teams most faithfully employing the new Salesforce tools as intended.

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When compared to average PwC teams, Trailblazers logged 163% more opportunities, created 92% more contacts, collaborated on chatter 376% more, accessed Einstein Analytics 9% more, and leveraged automated client onboarding capabilities 130% more. The result? When it came to revenue growth, these teams of power users produced a whopping 14% growth compared to 4% posted by average teams.

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Now, this data can be read in a couple of ways: either teams leveraging Salesforce’s full potential performed better, or high-performing teams craved powerful new tools to do their jobs more effectively. But either way, the impact on our business was extraordinary.

The wrap up

We hope this overview was useful. And of course, if you’re looking for support as you set out on your journey, contact us today. After all, our expertise with digital transformation isn’t about theory, it’s about practice. It’s about the hard-earned, hands-on experience that comes with navigating the largest single instance Salesforce implementation in the world — and doing so with success backed by stats.

In other words: we did it for ourselves and we can help do it for you.

| 1 | Understand the business | Trailblazers used 130% more automated client onboarding processes |
| 2 | Leverage relationships | Trailblazers used Einstein Analytics 9% more |
| 3 | Enhance collaboration | Trailblazers collaborated on chatter 376% more |
| 4 | Drive insights | Trailblazers created 92% more contacts |
| 5 | Automate the mundane | Trailblazers created 163% more opportunities |

Teams that committed to our new ways of working outperformed others in revenue growth by 10%