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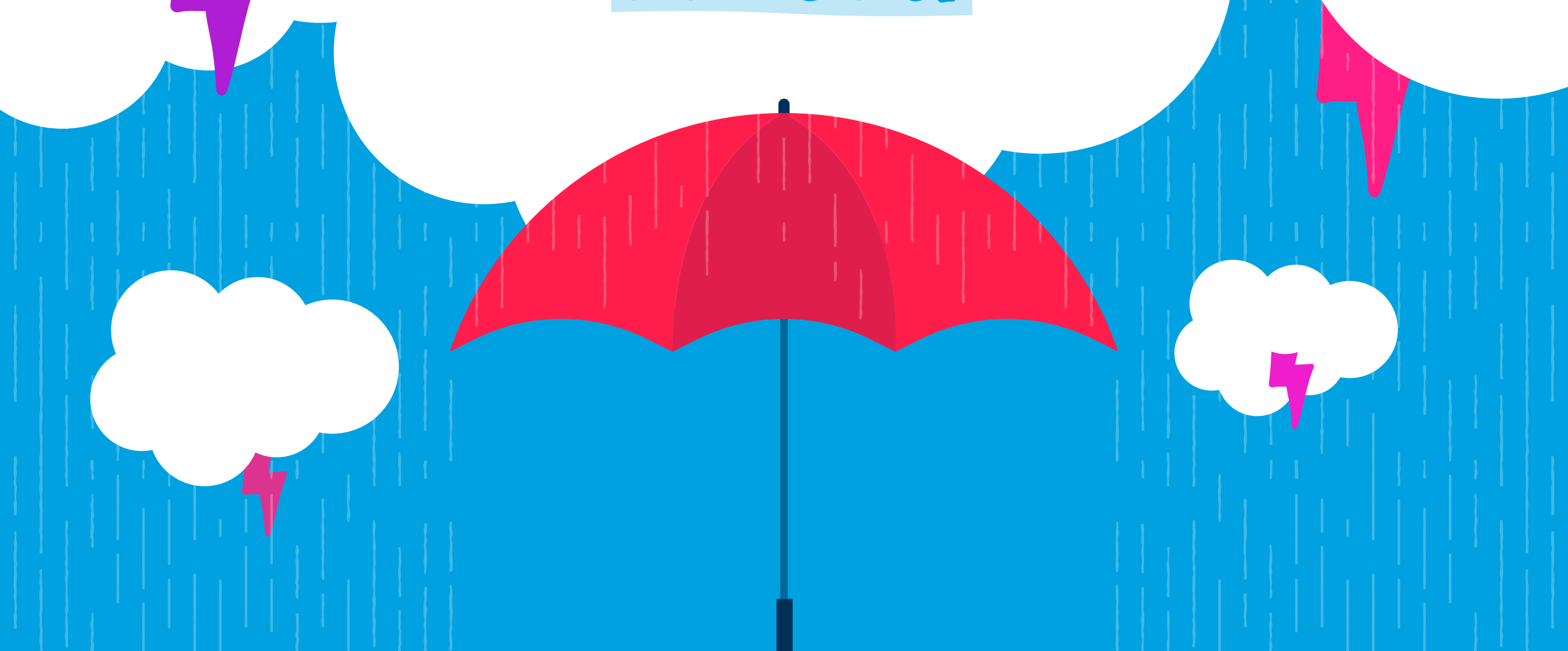
WHITEPAPER

How to Ensure a Successful Salesforce Implementation:

Five Obstacles to Avoid



With multiple products that connect seamlessly, Salesforce is the number one CRM worldwide for a reason – it gives companies a 360-degree view of their customers. Salesforce can be integrated with almost any 3rd-party system. It has features for sales, marketing, customer service, merchandising teams, IT, and more. But despite the power that this tool provides, a study by Merkle Group shows that CRM initiatives have a 63% fail rate. How can such a dynamic interface fail so many companies? Why are organizations struggling to find value in their CRMs? In this whitepaper, we will discuss some of the obstacles getting in the way of a successful Salesforce migration and how to overcome them.

Numbers to Know

91%
of companies with 10 or more employees have a CRM.[1]

22%
of Salespeople don't know what a CRM is.[2]

Conversion rates can rise by up to
300%
using CRM.[6]

3 out of 4
marketers say the Salesforce customer journey strategy has positively contributed to overall customer satisfaction.[3]

Customers on Salesforce see a
44%
increase in sales productivity.[4]

8 out of 10
Fortune 500 companies use at least one Salesforce product.[5]

FORTUNE 500

1. https://www.agilecrm.com/blog/statistics-that-prove-the-need-for-a-crm/
2. https://www.nutshell.com/blog/crm-stats/
3. https://www.salesforce.com/au/blog/2016/06/customer-satisfaction-overtakes-acquisition-as-top-marketing-pri.html
4. https://www.salesforce.com/content/dam/web/en_us/www/documents/e-books/sales/7-Ways-To-Break-Through-Sales.pdf
5. https://expandedramblings.com/index.php/salesforce-statistics/
6. https://www.smallbizgenius.net/by-the-numbers/crm-statistics/#gref

Obstacle #1

No Clear Objectives

Defining your goals is key when implementing any new tool or technology, especially Salesforce. While most organizations know that they want to see success after implementing a new CRM, determining exactly what success looks like is another story. Salesforce has the power to completely transform organizations, however, these high expectations cause many to assume that the tool will be a metaphorical 'cure-all' the instant it's installed. Without a clear view ahead, you can quickly set yourself up for disaster.

How to Overcome

Why are you implementing Salesforce? To see success with any CRM initiative, you need to start with a clear purpose in mind. Take a second and asses your entire organization before embarking on your project. Ask yourself the following questions and write down your answers:

What are we trying to accomplish by implementing Salesforce?
What are our overall business goals?
What pain points are preventing our growth?
Who will use the system and what do they need to accomplish?
What are our big opportunities?
How will Salesforce help us solve our problems?
How will we measure success?

This exercise will help you chart out your vision for a successful Salesforce implementation.

After you start to get an idea of what success looks like, create user stories to help you identify your goals. This is key to ensuring that your project doesn't get derailed with needless features. User stories are short, simple descriptions of a feature told from the perspective of the user. They usually follow a three-part structure:

As a type of user, **I want** some goal,

so that some reason.

Think about all of the key employees that will be using Salesforce and what they need to do. For example: “As a marketing manager, I want to send emails to prospects who are close to the point of purchase so I can encourage them to check out.”

Perform this exercise for every user group that will be using the system and take a moment to figure out how you’ll know if the requirements of each story have been successfully met. Get the entire team involved and get their input as well. Once you have all of your user stories documented, list them in order of priority to keep your project focused.

Obstacle #2
User Adoption

User adoption problems are one of the most cited reasons for failure when trying to implement a CRM. Employees may be reluctant to leave behind their more traditional way of doing things and they may be unaware of the value that the new system brings. It doesn’t matter how great your Salesforce system is if no one uses it. You need to create a strategy to get everyone on board at the beginning, with the same attention to detail you paid to your design, development, and testing procedures.

How to Overcome

No matter the size of your team, adopting any new tool will take some time. But by following a few thoughtful tips from the very beginning, Salesforce can be embraced by any organization.

1. **Get Executive Buy-in:** Adopting Salesforce will take a top-down approach and having support from leadership is critical for success. Senior leaders need to demonstrate the strategic value of the platform on a daily basis. Review and track all analytics in Salesforce and tie performance to usage with the mantra “if it’s not in Salesforce, it doesn’t exist.” Executives should also frequently communicate the overall value that the system is providing the sales teams and the company as a whole. If the messaging is clear and consistent, that Salesforce improves the overall revenue and improves customer experience, then the intrinsic drive is there for employees to use it.

2. **Train Your Users:** While Salesforce is known for its ease of use, remember that this is a whole new world for your team and they will need enough knowledge to properly use the platform. Train everyone in a way that is relevant and tailored to their daily responsibilities. Stretch out the training over multiple weeks to allow for follow-ups and to give users a chance to use the system and come up with questions later on. Trailhead is also a great way to start learning Salesforce and you can even track your employees' progress through each trail.

3. **Incentivize Usage:** Incentives and reward programs are a proven way to engage and motivate people. Whether it's a gift card or a small bonus, rewarding your power users can encourage your entire team to get involved. Start by deciding what behavior you want to reward the most, for example, new opportunities, logins, or closing tickets and reward the top performers as a part of a game or contest.

4. **Make Salesforce a Job Requirement:** To really drive adoption, you need to create a mindset amongst employees that Salesforce is necessary for their day-to-day jobs. Align Salesforce with mandatory business practices so people have no choice but to use it. Remove any workarounds, like spreadsheets, to encourage more usage.

Obstacle #3
Bad Data

Salesforce contains robust reporting tools, like Einstein Analytics and Tableau with data visualization capabilities that can empower decision-makers to have a high-level visual representation of how their business is performing and make decisions based on that data. Salesforce's Machine Learning tools work by using a training 'model' of past data to make predictions on future data. The prediction scores become more accurate as more data and engagement is provided to the Salesforce CRM system. Having data that is trustworthy and maintains integrity is essential to ensure those decisions are made correctly.

However, if your data is incorrect or outdated, these reports can easily steer you in the wrong direction. Some common data problems include duplicate records, missing fields, and just plain incorrect information. Poor data can cause companies to make poor business decisions and waste time and money. The phrase “garbage in= garbage out” has never rung more true.

How to Overcome

The path to truly clean data is a treacherous one and multiple processes must be in place to both prevent bad data from happening in the first place and clean up the data that is already in the system.

Evaluate: Start by assessing the health of your organization’s data. Dig deep and try to find out what percentage of data is complete, incomplete, inaccurate, or duplicated. Once you understand your data, seek to understand how it got that way in the first place. Talk with your team to find out the behaviors that may have led to bad data. Look at your third party systems as well to see if any of them could be affecting data quality.

Clean: Now that you’re armed with the knowledge of the current state of your data, you can take steps to clean it up. Start with removing or merging any of your duplicate records. Salesforce offers a Duplicate Management tool out of the box that will help you find and merge objects such as leads, contacts, and accounts. There are also a number of free tools in the Salesforce AppExchange that can make this whole process a lot easier. Once you’ve removed and merged data, take a look at what remains and find ways to improve upon it or fill in the blanks.

Maintain: Maintaining clean records can be tough but with some standards in place, you can reduce a great deal of bad data. Create a documented process that your team must follow when they enter new leads into the system and educate users on the importance of clean data. Validation rules are a great way to ensure that the data being entered by your staff meets your standards. These are simple formulas that can be set up to display an error message when the information doesn't meet your requirements. Once all is said and done, reward team members that follow the standards in place and make data quality matter to them.

This entire process is cyclical, not linear. Continue to evaluate, clean up, and maintain your data on an ongoing basis for success.

Obstacle #4

Poor Integrations

One of the main allures of Salesforce has to do with the fact that it can connect with nearly any third-party system. Through the platform, you can show a full view of your customers by pulling in data from various sources. With Salesforce, the sky is the limit on what external tools you can integrate and the powerful APIs make the process incredibly fast. These integrations can help boost productivity and save teams a lot of time in the long-run but when integrated poorly and without much foresight, they can cause more harm than good.

How to Overcome

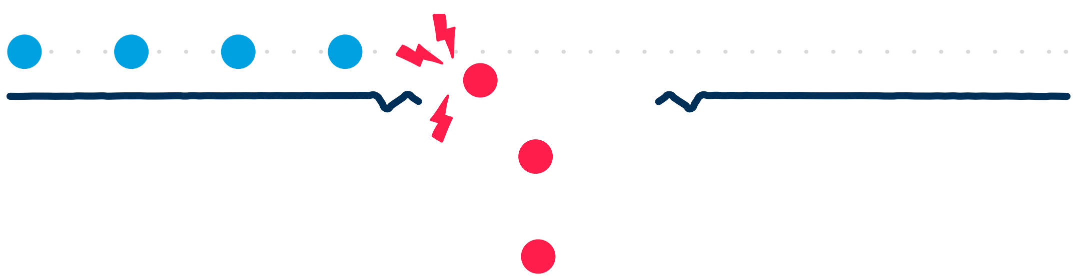
Integrating your systems effectively won't happen overnight. You'll need significant planning for success. Before embarking on an integration consider the following:

Why are we integrating this system in the first place? When you build out your Salesforce org, connecting your systems is key to gaining a full view of your business. However, you need to have a clear goal in mind along with an understanding of how the integration will help your operations. In some situations, there may be a better solution to your legacy system within the AppExchange. Assess all of your options and consider the cost and time involved with integrating each system. If none of the apps will fit your requirements, then move on to an API integration.

How will we keep data consistent? One common issue that comes up in many integrations with Salesforce has to do with mismatching fields. Your field types may vary between applications so it's important to set up proper field mapping within the data integration rules in Salesforce. Duplicate records and other data issues could also come into play when migrating data over from an external system. If your third party app has duplicate records, importing those duplicates will carry over into Salesforce. An external ID, which is a unique reference or 'key' that points to the record in the connect system, can help prevent the import from creating duplicate records.

How often will data flow between Salesforce and the external system? To maintain accurate data, it's important to remember that some import and exports may run as batches and new information may not be synced immediately. By leveraging Salesforce's Streaming API, you can help keep your interface up to date in real-time. Decide what applications need this the most and work from there.

Our teams typically provide multiple documents when we approach integrations. The "system-level overview," highlights the systems involved and maps the data flows between those systems and the "integration overview" provides the "why" and the "how" for each connection point in the overall architecture. In addition to this, we provide a "data dictionary" for each integration point which covers the "what" question with regard to integrations. It shows data point by data point how pieces of information map between the systems, the types of data they represent, and whether or not they are required.



Obstacle #5

Lack of a Core Team

To get the most out of Salesforce, a dedicated management team is crucial to success both during implementation and after launch. Clear roles and responsibilities need to be present as well. Without a strong team, your project can easily get off track.

How to Overcome

When building your Salesforce team, you'll need to do more than just enlist the help of your IT department. You need employees that will solely work with Salesforce and know the ins and outs of the system. Depending on your organization, you can either promote eager Salesforce experts from within, recruit outside staff, or outsource to an agency or consulting firm. When building your team, ensure they are well trained and able to cover the following essential tasks.

Administration: This can be commonly referred to as a Salesforce Admin. This person will be responsible for managing user licenses, setting user permissions, and maintaining reports and dashboards. Admins also keep Salesforce users trained and educated and keep projects moving forward.

Architecture: Having a knowledgeable Salesforce Architect is key during a Salesforce implementation project. This team member is in charge of identifying business needs and defining technical solutions that maximize the potential of the Salesforce platform. Many times they are the technical lead on a project and ensure that the right tools and processes are in place to prevent issues. They mostly focus on design and leave the build work to a developer.

Development: A Salesforce developer is responsible for managing and customizing the technical side of an organization's Salesforce instance. They have the power to create custom applications and processes, integrate third-party platforms, and troubleshoot issues.

Change Management: One of the most overlooked areas of responsibility involves change management. To truly see success with your Salesforce implementation, it is essential to have a staff member dedicated to driving adoption quickly across your organization. While the change manager may or may not have supervisory responsibility, this person will have to work through many within the organization to succeed.

When hiring anyone for your team, be sure they are a certified Salesforce professional. Salesforce provides a verification page you can use to check the certifications of any job candidates. Augmenting or outsourcing your team is another great option to get Salesforce support. Agencies that reach certified consulting partner status are required to undergo constant training to maintain their certification. Additionally, you have the entire agency team at your disposal to provide custom services and integrations.

In Conclusion

Salesforce has the power to transform organizations but many still struggle to leverage the robust functionality within their own teams. Consider the obstacles above as you navigate your Salesforce implementation project. Americaneagle.com offers an array of Salesforce services to ensure you get the most out of the platform. With our team of certified Salesforce professionals, we can provide:

Consultations

Implementations

Data & Third-Party Integrations

Platform & Custom App Development

Dedicated Support

building your digital mindset™

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