PS Solutions

SALESFORCE UNCOVERED:

WHO IS LOOKING OUT FOR YOU IN THIS JOURNEY?

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Introduction

Salesforce: A Market Leader but Not Without Its Complexities

Salesforce has revolutionized how companies manage their customer relationships, sales pipelines, and overall business operations. It stands as the world's leading CRM platform, used by over 90% of Fortune 500 companies. Its versatility and breadth make it a powerhouse, offering solutions from sales automation and customer service to advanced analytics and AI-driven insights. Moreover, Salesforce's dominance in the CRM market is significant, holding about 23% of the global CRM market share, which is larger than the combined share of its next four competitors (Microsoft, Oracle, SAP, and Adobe). But with great power comes great complexity.

Salesforce's promise is clear: it transforms businesses, streamlines operations, and drives revenue growth. However, the journey with Salesforce is fraught with hidden challenges, often underestimated by companies eager to jump on board. This white paper is designed to bring awareness through those challenges, highlighting what to consider, debunk common myths, and advocate for the importance of having a dedicated ally in your Salesforce journey.

What You Will Learn

- **Salesforce Modules:** Get familiar with each module, key features and benefits.

- **Things to Consider:** Before you renew your Salesforce license or add new features, consider the often-overlooked aspects like time, resources, and downstream impacts that could derail your implementation plans.

- **Common Myths:** Salesforce is often misunderstood as an out-of-the-box solution, but the reality is far different. We explore why every Salesforce setup requires careful customization, continuous training, and a formal governance process.

- **Maximizing Salesforce Value:** Learn how to create a vision, align Salesforce with your business needs, and continually optimize for maximum ROI.

- **Internal vs. External Resources:** Understand when to leverage internal staff versus bringing in external consultants for specific roles within your Salesforce ecosystem.

- **Handling Common Pain Points:** From user adoption struggles to navigating Salesforce's aggressive sales tactics, we cover the common complaints and how to tackle them.

As a decision-maker, you understand the importance of aligning technology with business strategy. Salesforce is no exception. While the platform offers vast potential, it also presents challenges that, if not managed correctly, can lead to significant setbacks. This white paper is crafted to provide you with insights that go beyond the technical details and focus on what matters most to you: driving growth, improving efficiency, and ensuring that your investments deliver maximum return. By the end of this paper, you'll have a clear roadmap for turning Salesforce into a powerful engine for your business's success, guided by expert advice tailored to the challenges and opportunities your organization faces.

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Salesforce Modules: Powering Seamless Business Operations

Salesforce offers a diverse range of functional components known as modules, each tailored to address specific business processes and requirements. These modules are designed to seamlessly integrate and automate your business operations, ensuring that Salesforce not only meets but exceeds your organizational needs. Below is a summary of key features and benefits for some of the most popular Salesforce modules:

Module	Key Features	Benefits
Sales Cloud	• Real-time sales pipeline tracking • Streamlined customer communication • Data-driven insights for informed decisions • Versatile across industries	• Increases sales team efficiency • Enhances CRM effectiveness • Boosts overall sales performance • Adapts to various business models
Service Cloud	• Centralized customer interaction management • AI-powered customer support solutions • Omnichannel support integration	• Reduces response time, improves issue resolution • Enhances customer satisfaction and loyalty • Streamlines service operations, reduces costs
Marketing Cloud	• Customer journey monitoring across touchpoints • Personalized experiences • Data-driven campaign optimization	• Improves customer engagement and retention • Drives higher conversion rates • Provides actionable marketing insights
Experience Cloud	• Branded community engagement for customers, partners, employees • Customizable community experience • Empowering self-service options	• Enhances collaboration and communication • Increases customer and partner loyalty • Reduces support costs, improves user satisfaction
CPQ	• Streamlined and automated quoting process • Supports complex product configurations • Efficient contract and renewal management	• Reduces errors, accelerates sales cycles • Enhances accuracy in pricing and quoting • Improves compliance, optimizes revenue recognition
Field Service	• Optimized scheduling and dispatching • Mobile access to work orders and data • Real-time field operation tracking	• Increases field service productivity, reduces travel time • Enhances accuracy and efficiency in the field • Improves customer satisfaction with timely service
Data Cloud	• Data integration from multiple sources • Ensures data integrity through standardization • Facilitates advanced data analysis	• Improves data quality and reliability • Supports comprehensive insights and analysis • Boosts operational efficiency through better data management

Module	Key Features	Benefits
Financial Service Cloud	• Comprehensive client relationship management • Supports personalized financial planning • Ensures compliance with financial regulations	• Enhances client trust and satisfaction • Improves client outcomes and loyalty • Reduces risk, ensures adherence to industry standards
Government Cloud	• Secure, compliant infrastructure for government needs • Enhances citizen and agency engagement • Centralized data management for better decision-making	• Ensures data security and regulatory compliance • Improves service delivery, transparency • Enhances efficiency and responsiveness of government services
Education Cloud	• Manages student lifecycle, from admissions to records • Strengthens alumni relationships • Centralizes campus operations	• Enhances student experience and outcomes • Increases alumni contributions and engagement • Improves operational efficiency, enhances collaboration
Health Cloud	• Centralized patient management • Facilitates care coordination among providers • Ensures compliance with healthcare regulations	• Enhances patient care and satisfaction • Improves health outcomes, reduces costs • Protects patient data, ensures regulatory adherence
Commerce Cloud	• Seamless cross-channel shopping experience • Personalized shopping journeys • Intelligent product recommendations	• Enhances customer satisfaction • Boosts sales and revenue • Ensures consistent brand experience
Analytics	• Interactive dashboards and data visualization • Predictive analytics for trend forecasting • Integrates data from multiple sources for thorough analysis	• Improves data comprehension, supports decision-making • Enables proactive strategic adjustments • Enhances data-driven business strategies
Customer 360	• Unified view of customer data across departments • Actionable insights for personalized interactions • Enhanced communication strategies	• Fosters deeper customer relationships • Aligns business operations with customer needs • Drives business growth through better customer understanding

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Things to Consider Pre-Renewal and Before Adding Salesforce Clouds

Underestimated Challenges of Salesforce Renewal and Adding of Clouds

One of the most common pitfalls companies face when renewing and implementing Salesforce is underestimating the time and effort required. Your initial Salesforce implementation required careful planning and a change of management plan, and renewals and new products also require discipline.

- **Corporate Time and Resource Allocation:** Salesforce projects are notorious for requiring extensive time commitments across multiple departments. IT teams, business analysts, project managers, and end-users all need to be involved in the setup, customization, testing, and training process. This pulls key resources away from other critical tasks, causing disruptions that ripple across the organization.

- **Downstream Impacts and Future Integrations:** When considering your renewal or additions of Salesforce products or additional Clouds, it's essential to think ahead. What happens if you decide to add an ERP system or another key technology in the next few years? Integrations are complex, costly, and require rethinking existing Salesforce configurations. These downstream impacts often complicate your tech stack, leading to unexpected expenses and project delays.

- **Scenario Planning for Future Technology Additions:** Salesforce should not be considered in isolation. As your business evolves, your tech stack will too. Future-proofing your Salesforce implementation means accounting for potential additions like ERP systems, marketing automation tools, and data lakes. Without proper planning, adding these technologies becomes a logistical nightmare, creating data silos, broken workflows, and excessive costs.

- **User Adoption planning:** Many Salesforce customers don't place ongoing User Adoption as a top tier consideration when looking at the additions of clouds or even in the renewal of needed users.

CASE STUDY #1

Check Out Our Case Study that is Further in this White Paper

Successful Salesforce Implementation for an Online Medical Services Provider

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User Adoption: The Key to Long-Term Success

A successful Salesforce implementation doesn't end with deployment; it hinges on user adoption. Many companies assume that once the system is live, employees will intuitively start using it to its full potential. This is a critical misstep.

- **Change Management and Training:** Effective change management is crucial. Training needs to be continuous, tailored to the varying needs of different roles within the organization, and regularly updated to keep pace with Salesforce updates. Without proper change management, user adoption falters, leading to underutilized features and missed opportunities for optimization.
- **Adoption Metrics and Feedback Loops:** Implement a structured and quantitative approach to measuring adoption. Track which features are being used, identify areas of friction and continuously solicit feedback from users. Regularly assess and share these metrics to adjust training and communication plans accordingly.

The Hidden Costs of Salesforce

The true cost of Salesforce ownership goes well beyond the initial purchase price. This is crucial to consider, as the actual costs often increase by up to two-thirds compared to the initial estimates provided by Salesforce representatives. The true cost of ownership includes customization, ongoing maintenance, training, and often, rescue work when implementations go awry.

- **Customization, Implementation, and Maintenance:** For every dollar spent on Salesforce licenses, businesses often spend three times that amount on customization, implementation, and ongoing support. Custom workflows, tailored dashboards, and specialized reports all require professional services, whether internal or external.
- **Lack of Disclosure on Professional Services Needs:** Salesforce sales representatives may gloss over the need for professional services. They focus on the allure of the platform's capabilities without fully disclosing the extensive support required to unlock those capabilities.
- **Bloat in Licensing and Excess Costs:** One common pitfall is over-licensing, where companies pay for more seats or features than they actually use. Regular audits of license usage reveal bloat, allowing you to adjust your subscription and save costs.
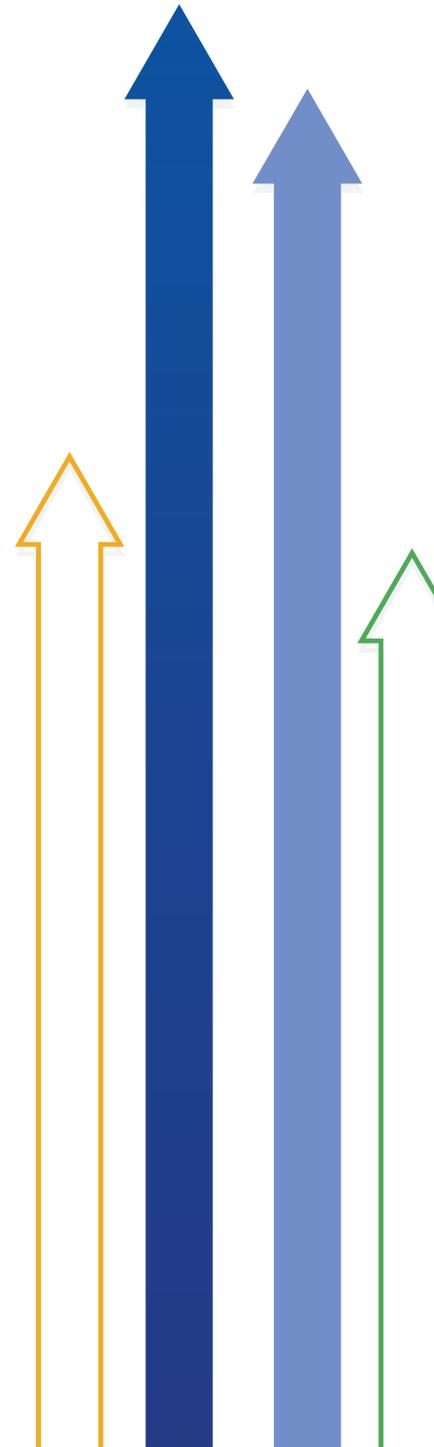
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Performance and Optimization Analysis

Regular performance analysis ensures that Salesforce is being used efficiently and that the platform continues to meet evolving business needs.

- **Optimization Reports and Usage Analytics:** Use tools like Elements.cloud to identify underused features, system inefficiencies, and bottlenecks. User reports also show who is engaging with the system and who isn't, helping you target training efforts where they are needed most.

Planning for Continuity and Governance

Salesforce implementations are not a one-time event; they require ongoing governance to maintain alignment with business objectives.

- **Governance Committees:** Establishing a Salesforce governance committee helps ensure consistent data management, aligns Salesforce with evolving business strategies, and oversees change management efforts.
- **Data Hygiene and Reporting Consistency:** Inconsistent data leads to conflicting reports and undermines decision-making. Regular data hygiene checks, deduplication efforts, and standardized reporting protocols are essential for maintaining data integrity.
- **Expectations vs. Reality:** Common assumptions about Salesforce, such as data cleanup and deduplication being part of the package, are often incomplete. Clearly outline what is included in your implementation and what will require additional effort.

CASE STUDY #2
Check Out Our Case Study that is Further in this White Paper

How a Clinical Research Organization Achieved Salesforce Optimization

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Debunking Salesforce Myths

Salesforce is often surrounded by myths and misconceptions that mislead decision-makers. These myths cause organizations to mismanage expectations and overlook critical implementation needs.

MYTH 1
Salesforce is an Out-of-the-Box Solution

Salesforce markets itself as a comprehensive, ready-to-go platform, but the reality is far more nuanced. Most Salesforce deployments require customization, and in many cases, significant customization, to meet specific business needs.

- **Customization Requirements:** From tailored workflows to custom dashboards and reports, Salesforce must be meticulously configured to align with each company's unique processes. Without this customization, the platform's full potential to perfectly align with your business needs and process remains untapped.
- **Implementation Complexity:** Implementing Salesforce correctly involves much more than a basic setup. It requires expert input, careful planning, and rigorous testing to ensure that the system works as intended.

MYTH 2
User Adoption Will Happen Naturally

Even the most user-friendly CRM needs ongoing user engagement efforts. Without change management and structured training, adoption rates lag, and many features remain unused.

- **Change Management Essentials:** Effective change management goes beyond initial training sessions. It includes continuous education, a clear communication plan, and the integration of user feedback to refine processes over time.

MYTH 3
It's a Set-and-Forget Solution

Salesforce demands continuous attention. Regular updates, new feature rollouts, and evolving business needs mean that Salesforce must be regularly maintained, updated, and optimized.

- **Continuous Maintenance:** Ongoing maintenance is non-negotiable. New updates often disrupt existing workflows if not managed correctly, and new features need to be rolled out with corresponding training and support.

MYTH 4
Salesforce Won't Strain Your Team

Salesforce's complexity places unexpected burdens on your staff, affecting everything from ongoing data management to system troubleshooting. The platform significantly impacts day-to-day operations, demanding continuous attention and resources.

- **Staff Workloads:** Admins, end-users, and managers all bear the brunt of Salesforce's operational demands. Regular audits of staff workloads help identify when additional support is needed.
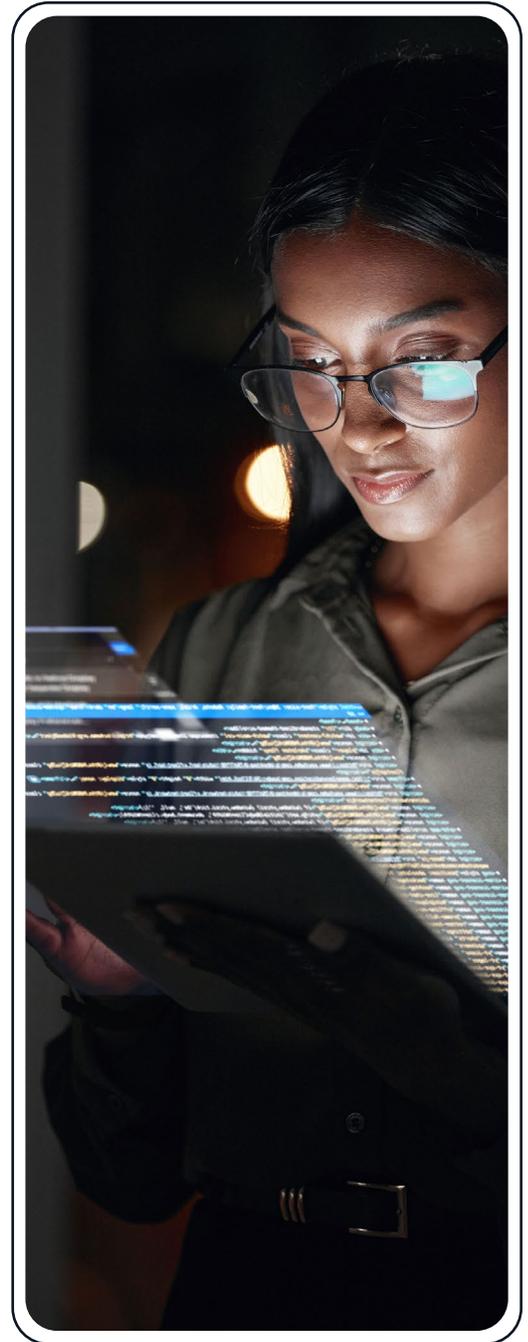
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MYTH 5
Executive Involvement is Minimal

Executives play a key role in driving Salesforce adoption. Their engagement is vital to setting strategic direction, championing the platform's use, and modeling expected behaviors.

- **Role of Leadership:** Leadership needs to be visibly involved, from setting expectations to engaging in regular reviews of Salesforce performance and alignment with business goals.

Getting the Most Out of Salesforce

Building a Vision for Salesforce

The foundation of a successful Salesforce journey starts with a clear vision. This vision must align with broader business objectives and serve as a guidepost for all implementation and optimization efforts.

- **Crafting a Business Case:** Outline the expected benefits of Salesforce and the specific business challenges it aims to address. This should include both qualitative and quantitative goals, such as improving customer satisfaction scores or reducing sales cycle times.
- **Developing User Stories:** User stories are detailed scenarios that describe how different users interact with Salesforce. These stories help tailor the platform to meet the needs of various roles within your organization, ensuring that Salesforce delivers value at every level.

User Adoption Planning

User adoption isn't a one-time task but an ongoing strategy. Implementing structured adoption plans, regular training sessions, and creating feedback loops are critical to maintaining momentum.

- **Communication Plans:** Develop comprehensive communication strategies that keep users informed about new features, updates, and training opportunities. Transparent communication helps manage expectations and foster a culture of continuous learning.
- **Showcasing Success Stories:** Highlight case studies and testimonials from within your organization to demonstrate the platform's impact. Sharing success stories boosts morale and encourages others to engage more fully with Salesforce.
- **Pervasive Use:** Salesforce should be used as a real-time management system in pipeline calls, 1:1 coaching sessions, and anywhere data for business management is required. Setting the expectation that data accessed via Salesforce should always be current and up-to-date will drive compliance and adoption.

CASE STUDY #3
Check Out Our Case Study that is Further in this White Paper

Successful Salesforce Implementation for a Non-Profit Agency

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Evaluating Ongoing Manual Processes

Many organizations still rely on manual processes that could be streamlined within Salesforce. Regularly evaluate these processes to identify opportunities for automation and integration.

- **Integration of External Processes:** Map out manual processes and explore how Salesforce can absorb these tasks. Integrating these workflows not only saves time but also centralizes data, making it more accessible and actionable.
- **Product Ownership:** Assign a dedicated Salesforce product owner who oversees the platform's usage, aligns it with business goals, and ensures that it continues to deliver value.

What We Tend to Overlook

TECHNOLOGY ACCEPTANCE MODEL

The Technology Acceptance Model (TAM) is a theoretical framework that seeks to explain how users come to accept and use technology. The model was developed by Fred Davis in 1989 and is based on the Theory of Reasoned Action (TRA). TAM posits that two primary factors influence a user's decision to adopt and use a new technology:

- **Perceived Usefulness (PU):** The degree to which a person believes that using a particular system will enhance their job performance.
- **Perceived Ease of Use (PEOU):** The degree to which a person believes that using a system will be free of effort.

These two factors influence the user's attitude toward using the technology, which in turn affects their behavioral intention to use it and ultimately leads to actual system usage. When applying the Technology Acceptance Model to Salesforce, the key is to understand how both perceived usefulness and perceived ease of use can drive or hinder the adoption of Salesforce within an organization.

```
External Factors → Perceived Usefulness (PU)
External Factors → Perceived Ease of Use (PEOU)
Perceived Usefulness (PU) / Perceived Ease of Use (PEOU) → Attitude Toward Using → Behavioral Intention To Use → Actual System Usage
```

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When to Turn to Internal Resources vs. External Consultants

Leveraging Internal vs. External Expertise

The decision to use internal resources versus external consultants often hinges on the specific needs of your Salesforce implementation. Understanding when and how to use each impact your Salesforce success.

- **External Development:** Development tasks often require specialized skills that internal teams may lack. External developers bring experience from other implementations, offering fresh insights and best practices that streamline the development process.

- **Internal Product Ownership:** Keeping product ownership internal ensures that Salesforce remains closely aligned with your evolving business strategy. Internal owners understand the nuances of your company's operations, allowing them to make informed decisions about platform adjustments.

- **Architectural Guidance:** Architects should generally be external to bring a broad view of the Salesforce landscape. They have the know-how to advise on best practices, optimal configurations, and how to construct Salesforce to best serve your business needs.

Managing Turnover and Continuity

High turnover rates among Salesforce administrators and consultants lead to significant continuity issues. Having clear roles, structured documentation, and a governance framework helps mitigate the impact of staff changes.

- **Training and Documentation:** Maintain detailed documentation of your Salesforce setup, including workflows, customizations, and configurations. This serves as a reference for both internal teams and external consultants, ensuring a smoother transition when roles change.

- **Part-Time QA and External Training:** Quality assurance roles are sometimes managed internally on a part-time basis, while training is often best handled by external experts who stay current with Salesforce updates and trends.

In conclusion, Development should be handled externally, while the Product Owner and Salesforce Admins should be internal roles. Architects are best kept external, QA should be a part-time internal role, and trainers should be external due to high turnover.

CASE STUDY #4

Check Out Our Case Study that is Further in this White Paper

Salesforce Performance Analysis – Unveiling Blind Spots: Optimizing Salesforce for Unified Efficiency

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Common Complaints About Salesforce

Airing the Frustrations: User Feedback and Pain Points

Salesforce isn't without its critics. From user forums to Reddit threads, the complaints are loud and clear: Salesforce can be complex, overwhelming, and often feels like a burden rather than a solution.

Overwhelmed by Complexity

"Managing Salesforce feels like a second full-time job. Customization is a constant challenge, and every new update requires hours of reconfiguration. It's exhausting."

Endless Updates, Endless Headaches

"Every time Salesforce rolls out an update, it breaks something in our system. We spend more time fixing things than actually using the platform to improve our business."

Admin Turnover Chaos

"We've had three Salesforce admins in two years. Each transition has been a nightmare, with lost knowledge, stalled projects, and inconsistent configurations that have cost us dearly."

Customization Confusion

"We were told Salesforce would be a perfect fit right out of the box. Instead, we've been bogged down with endless customization that never quite meets our needs. Adoption is low because users are frustrated."

Strategies to Mitigate These Issues

INVEST IN CONTINUOUS LEARNING

- **Expand Learning Resources:** Beyond workshops and webinars, consider creating a dedicated Salesforce knowledge base or intranet where team members have access to guides, video tutorials, and FAQs. This is especially useful for onboarding new team members and ensuring they quickly get up to speed.
- **Role-Specific Training:** Tailor training programs to different roles within the organization. For example, provide advanced customization training for admins, user experience best practices for designers, and feature usage training for end-users.
- **Regular Feature Reviews:** Schedule quarterly or bi-annual reviews of Salesforce's latest features and updates. This helps your team stay current with new capabilities and ensures they leverage the platform's full potential.

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ESTABLISH CLEAR OWNERSHIP

- **Define Roles Clearly:** Create a detailed map of who is responsible for different aspects of the Salesforce ecosystem. For instance, designate a specific person or team for data management, another for customization, and another for user support. This prevents overlap, reduces the chances of miscommunication, and ensures that every task is accounted for.
- **Implement a Governance Committee:** Form a Salesforce governance committee consisting of key stakeholders from different departments. This committee oversee the strategic direction of Salesforce usage, approve major changes, and ensure alignment with broader business goals.
- **Accountability with KPIs:** Set key performance indicators (KPIs) for Salesforce management roles. For example, track metrics like user adoption rates, data accuracy, and system uptime. Regularly review these KPIs to identify areas for improvement and ensure accountability.

FOSTER A CULTURE OF FEEDBACK

- **Implement Feedback Loops:** Encourage users to regularly provide feedback on their experiences with Salesforce. This is done through surveys, suggestion boxes, or regular check-ins. Addressing pain points raised by users always leads to smoother operations and higher adoption rates.
- **User Groups and Forums:** Establish internal user groups where team members share tips, tricks, and solutions to common problems. This fosters a collaborative environment where issues are resolved quickly through peer support.

UTILIZE EXTERNAL EXPERTISE

- **Engage Consultants for Complex Projects:** For major Salesforce projects, such as large-scale customizations or integrations, consider bringing in external consultants who specialize in Salesforce. Their expertise prevents common pitfalls and ensure that the implementation aligns with best practices.
- **Periodic Audits by Third Parties:** Regularly bring in third-party experts to audit your Salesforce implementation. They provide an objective view of how well your system is configured, identify inefficiencies, and suggest optimizations.

DEVELOP A ROBUST CHANGE MANAGEMENT PLAN

- **Pre-Implementation Communication:** Before rolling out major updates or new features, communicate the changes clearly to all users. Explain how the changes will benefit them and what they need to do to adapt.
- **Post-Implementation Support:** After new features are rolled out, provide additional support for a few weeks to help users adjust. This could include having a "help desk" team on standby to answer questions or troubleshoot issues as they arise.

PS Solutions Case Studies

CASE STUDY #1
Successful Salesforce Implementation for an Online Medical Services Provider

OVERVIEW

An online medical services provider believed that their prior experience with Salesforce at a previous organization would enable them to implement the platform independently across their enterprise.

Despite their confidence, the company faced significant challenges during the implementation process. Over the course of one year and with an investment of $1 million, they encountered numerous failures. The project involved various in-house and offshore resources, but ultimately, the implementation was deemed unsuccessful and was completely abandoned.

SOLUTION

Recognizing the need for expert guidance, the organization engaged PS Solutions to provide a comprehensive architectural framework and the necessary resources for a successful restart. Our team conducted a thorough assessment of the existing situation and developed a tailored implementation strategy.

RESULTS

Within a few months, PS Solutions successfully delivered the first phase of the Salesforce implementation. The new approach not only addressed the previous shortcomings but also laid a solid foundation for future phases. The client was able to leverage the platform effectively, enhancing their operational efficiency and overall service delivery.

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CASE STUDY #2

How a Clinical Research Organization Achieved Salesforce Optimization

OVERVIEW

Our client, a Clinical Research Organization, has experienced incredible company growth, but their Salesforce instance was not keeping up with their scalability needs. They needed process and automation, data hygiene and data visualization, and continued optimization for their Salesforce org. After a year of working with us, our client has seen a steep increase in user adoption, sales performance improvements, and more rapid cycle speed.

SOLUTION

Under our Admin On-Call managed services solution, our client has identified specific areas of improvement with their dedicated Salesforce admin. From reports and dashboards to installation of a third-party business intelligence tool, to management training and Salesforce security improvements, we continually present proactive progressions to keep their sales motions moving forward.

RESULTS

Within a short window of time, we delivered on the initial phases of the project and they reported increased user adoption, data hygiene was resolved, business intelligence has grown to an essential part of their business. Additionally, all training and security improvements have yielded positive results.

CASE STUDY #3

Successful Salesforce Implementation for a Non-Profit Agency (In-Process)

OVERVIEW

Our client, a non-profit agency, needed a system that enables them to carry out the processes that they use to maintain, monitor, and acquire properties. While also maintaining data hygiene, standardizing current processes, and visualizing their data. They needed a defined data structure, migration to Salesforce, defined processes, and training on using Salesforce.

The challenge is that the agency is currently using a process and system that doesn't allow them to maximize their productivity to the best of their ability. A process to accomplish one thing is carried out differently by multiple team members, causing confusion and delays the time that it would take to get the task done. The data that is collected on properties is currently stored on spreadsheets and external drives limiting the ability to view how all of the data relates to each other. Lastly, the current process isn't very user friendly. Users are manually entering data twice the second time to transfer data from where it was collected to their internal system.

SOLUTION

The first thing we needed to do to address the challenges is to build a data structure in Salesforce using custom objects to build a relationship between the different sets of data (management units, properties, monitoring reports, etc). Once the data structure is complete, we'll need to migrate the SharePoint data into these custom objects. Next, we will standardize the processes that are being migrated into Salesforce with their internal team and optimize the processes with automation where it's needed. Lastly, we will need to provide training on Salesforce to the new users and also train stewardship on Salesforce Mobile.

EXPECTED RESULTS

After implementing the solution for our client, we expect to have standardized processes, a holistic visualization of data, and an increase in productivity. By moving over to Salesforce, when users go through processes such as property acquisition, the constraints defined by our client will verify that specific steps in the process are being completed to the standard that has been set. The data structure will enable users to generate reports on properties giving them greater insight into things like which contacts are currently members with WPA, contacts related to properties, or monitoring reports completed in the month. With the adoption of Salesforce, users will be able to save time carrying out various tasks like receiving approval on the prospect checklist. The approval process will be automated for the department.

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CASE STUDY #4

Salesforce Performance Analysis - Unveiling Blind Spots: Optimizing Salesforce for Unified Efficiency

OVERVIEW

Amidst the chaos of disconnected operations and isolated systems, our client faced the complexity of understanding how each department utilized Salesforce.

The core challenge was to determine if Salesforce could serve as the unified solution they envisioned. Concerns loomed over the platform's ability to deliver industry-specific features while staying within storage capacity limits and budget. Demanding clarity before committing to a platform-wide overhaul.

SOLUTION

Our performance analysis acted as a guidebook, offering clarity on Salesforce's viability. It unearthed an incorrectly configured object flooding the system with purposeless records. Addressing this would reclaim a staggering 31% of storage capacity, creating an opportunity to bring in siloed departments to utilize Salesforce's wide array of products.

Additionally, we identified cluttered objects and reports, recommending the removal of over 1,000 unused reports and over 50 unpopulated fields.

RESULTS

1. **Storage Optimization:** Increasing storage capacity enabled siloed departments the opportunity to standardize processes within Salesforce, fostering unified operations and enhancing collaboration.
2. **Unified Process Identification:** Examining record type usage, field utilization, and report interactions revealed inefficiencies and areas for improvement, empowering our client to take action on process standardization.
3. **Clutter Reduction:** By identifying redundant reports and fields, the removal can simplify navigation and enhance overall productivity, providing a clear path for streamlined workflows.

CONCLUSION

This case underscores the importance of expert guidance in complex system implementations. With the right support, organizations can overcome initial setbacks and achieve successful outcomes.

Last Thought: Turn Salesforce into a Business Asset

Salesforce has the transformative power to elevate your business, but realizing its full potential requires more than just purchasing a license. Successfully navigating Salesforce's complexities demands a strategic approach, expert guidance, and a commitment to continuous optimization. With the right support, Salesforce can evolve from a powerful tool into a vital asset that drives your business forward.

Take the Next Step Toward Success

With extensive Salesforce expertise, we are uniquely positioned to guide you through every phase of your Salesforce journey. Whether you're just starting with implementation, need ongoing management, or require expert intervention to correct previous missteps, our services are tailored to ensure that Salesforce delivers the maximum value to your organization.

Let's Connect

If you're looking to optimize your Salesforce investment and ensure it's working effectively for your organization, we're here to help.

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About PS Solutions

PS Solutions is a premier technology services provider dedicated to helping businesses leverage innovative IT solutions to drive growth and efficiency. With a team of highly skilled professionals, PS Solutions offers a comprehensive range of services, including custom software development, IT consulting, and digital transformation. Our mission is to empower organizations by delivering tailored technology solutions that meet their unique needs and challenges. At PS Solutions, we pride ourselves on our commitment to quality, customer satisfaction, and our ability to help clients stay ahead in an ever-evolving digital landscape. Discover how PS Solutions can transform your business today by visiting PSSolutions.net.