

Salesforce Sales Cloud Implementation: How to make the most of it?

Organizations in today's highly competitive business environment often struggle to thrive and get the most out of their sales tools and reps. Implementing the Salesforce Sales Cloud under such circumstances enables automation of the sales process and assists the sales team. The Sales Cloud offers end-to-end sales process transformation for organizations to flourish in this competitive environment. Using the Sales Cloud can help optimize sales and ramp up the performance of your sales teams.

This eBook explains everything you should know about a Sales Cloud implementation and how it helps businesses get more leads, close deals faster, build efficiency and track sales performance.

Defining Sales Cloud

Sales Cloud is the Salesforce CRM platform that works as SaaS (Software as a Service) and uses a subscription model for its pricing. It is fully customizable, gathers all customer information in an integrated platform, and is immensely valuable for companies focused on leads, opportunities, and sales.

Sales Cloud is a powerful platform that helps close deals faster for B2B and B2C companies. Not only the sales department but the entire organization can also easily use it.

Sales Cloud - How does it work?

- Sales Cloud is created to handle an organization's end-to-end functioning of the sales department.
- It empowers sales reps to work fast, and smart - a sales team can convert leads and close more deals with Sales Cloud, thus driving business growth.
- Automation with Sales Cloud creates a well-structured sales process that assists sales managers and reps to be more productive.
- Sales, marketing, and customer support being aligned in one place allows a complete view of customers.
- Sales Cloud provides easily accessible data and extensive customer details and maintains efficient communication via multiple channels.

Benefits of Sales Cloud - Why Choose Salesforce?

Salesforce enables you to work smarter, connect better with customers, sell more, and grow your business faster. The Sales Cloud platform provides a seamless, personalized buying experience converting more prospects to customers. It empowers the sales team to win deals that align with company growth.

Sales Cloud has various features, including process automation and sales forecasting using artificial intelligence. The insights, guidance, and forecasts using AI can boost team impact. Further, adding custom features to a standard implementation is also possible.

Sales Cloud allows you to grow your business by evolving your sales strategy and expanding your reach to new markets and industries. Further, a Salesforce-certified consulting partner can configure Sales Cloud to fulfil your business goals and ensure the organization gets the maximum ROI.

How Sales Cloud Benefits the Organization:

Following are a few significant benefits that Salesforce Sales Cloud offers:

- **Customized and fast solution:** Salesforce solution, due to its exceptional capabilities for customization, helps your business grow in a short time.

- **High ROI:** Salesforce implementation generates up to 600% ROI.
- **Integrated with other applications:** Salesforce integrates Sales Cloud with other software of numerous vendors via API (Application Programming Interface).
- **Comprehensive customer data:** Allows a total 360-degree view of customers' data.
- **Automation:** Sales Cloud enables automation on dull & repetitive tasks and takes the load off your team.
- **Personalized customer experience:** Connects sales, marketing, finance, billing, and service teams to guide each prospect through a customized journey.
- **Cross-sell/upsell:** Cross-sell, upsell, and renew customers by anticipating and exceeding their needs. The Sales Cloud solution also helps build longtime, loyal customers with every interaction.
- **Better team communication:** Sales Cloud improves team communication and helps close deals faster. It also helps sales managers and sales reps do their job with increased efficiency.
- **Data analytics:** With Sales Cloud, you get improved analytical data and reporting.
- **Remote working:** Allows steering through periods of uncertainty with a CRM that gives deeper customer insights and work-from-home capabilities.
- **Better team management and productivity:** Helps plan territories, see team performance, and track rep execution. Sales Cloud enables the onboarding of new reps faster and provides them with a blueprint for success. It also helps transform sales challenges into success stories.

How Sales Cloud Benefits the Sales Managers:

- **Drive Sales Decisions:** Sales managers can leverage this platform product to analyze data, trends, and opportunities in real-time. Using these insights, they can fine-tune the sales strategy or pricing rules to meet sales targets.
- **Track Performance of Sales Reps:** Sales managers can assess the strengths and weaknesses of sales reps and recommend training for performance improvement.

How Sales Cloud Benefits Sales Reps:

- **Manage Contacts:** Sales reps can leverage the Sales Cloud user interface to manage contacts/accounts, leads, opportunities, and customer communication seamlessly in a better manner.
- **Automate Manual Tasks:** Sales reps can automate redundant sales tasks and concentrate on closing deals fast and promoting customer relationships.
- **Gain Insights:** Sales reps can get information on leads with a high probability of conversion and prospects who demand extra attention. It helps them accurately target the pain points of leads/prospects and recommend the right solutions.

Best Practices for Successful Implementation of Sales Cloud

Any software implementation comes with many challenges - but with the right strategy - all those hurdles can be overcome. The best practices facilitating your Salesforce Sales Cloud implementation are:

Business Process Automation

Automation allows sales reps to save time and focus on core tasks instead of dull, repetitive ones, thereby increasing their efficiency. Sales Cloud offers automation capabilities throughout sales processes – from prospecting to closure and post-sales follow-ups.

The benefits of business process automation:

- **Easily adaptable:** Salesforce's easy-to-use platform allows even non-technical sales workforce to set up automated workflows with just a few clicks.
- **A ready-to-use platform:** Salesforce provides a ready-to-use platform and several tools to automate your organization's repetitive business processes.

- **Self-help learning platform:** Its free learning platform allows you to learn about Salesforce and transform your business. It offers engaging modules and sessions with Salesforce experts so sales teams can learn and fast-track their career growth.

The steps to automate business processes:

- **Analyze:** The first and foremost step is to analyze the current business processes to determine areas that need substitution via automation.
- **Redesign:** The next step is to redesign the processes with built-in automation by mapping the steps for automation and determining what benefits you will derive by automating each step.
- **Optimize:** Salesforce offers businesses flexibility and scalability by allowing them to recalibrate, improve, and optimize processes continuously. Ways to optimize the automation initiative include Documentation, Training, Measurement, and Enhancement.

Improving Lead Conversion

Lead conversions fuel business, and this is what every company aspires to. By improving lead conversion rates, the time & effort lost by sales teams on nurturing prospects is substantially reduced, thus increasing their efficiency.

Salesforce Sales Cloud helps boost lead conversions by:

- **Capturing more leads:** Consolidating & automating the lead entry to grab more leads, thereby enhancing the conversion rate. It can be achieved by capturing standard customer information using fields on the web forms.
- **Prioritizing with lead scoring:** Multiply your lead conversion rate by prioritizing leads via an AI-led scoring system.
- **Measuring lead conversion rate:** Using sales funnel metrics to measure lead conversion rates to get clear visibility.
- **Nurturing and growing leads:** Nurture and grow leads by targeting them using campaigns. Leveraging campaigns ensures a constant flow of high-quality leads into the sales pipeline.

Keep Track and Close More Deals With Data Insights

Sales teams are under continuous pressure to seal deals and win customers. Challenges faced mainly by sales reps in their quest to close deals are a lack of visibility into the sales pipeline to identify stuck deals, inadequate competitor insights, and a lack of motivation.

With data insights, sales reps can discover winning strategies and quickly take leads from opportunities to close deals. This pioneering strategy in Salesforce enables them to close deals and win over customers faster. These insights can help sales teams make more effective customer decisions and map market opportunities and team performance.

Salesforce Sales Cloud can drive the winning rate and help your sales reps in the following manner:

- **Trace and analyze competition:** Sales Cloud provides a clear understanding of the competitor's product, providing critical insight and helping define a transparent process backed by data insights. Sharing competitive intelligence easily across the sales team (via reports, dashboards, and Chatter groups) helps to improve the reps' ability to position a product or service better and win more deals.
- **Identify stuck deals:** A dashboard component such as *My Stuck Opportunities* helps sales reps and managers. It helps them identify and act on lagging deals or require assistance depending on traits like stage duration. Such steps can help to increase win rates.
- **Promote healthy competition:** Sales Cloud enables tracking and analyzing what sets the star performers apart by capturing all their activities. These insights can be shared with the rest of the team to motivate reps and build healthy competition using Salesforce leaderboards.

Improve Sales Rep Efficiency

Sales reps spend most of their time performing manual processes and searching for information, affecting their efficiency.

Salesforce helps increase sales rep efficiency by:

- **Providing competitive insights:** Often, competitive insights go undiscovered in most organizations because sources are spread across the organization. Strengthening competitive information helps better position the business products and services based on the competitive environment. Easy access to competitive information and quick access to subject matter experts can help reps with the right resources, eventually leading them to win more deals.
- **Access to consolidated information:** With immediate access to information, sales reps can plan their day better. Salesforce can automatically sum up an account's open opportunity and closed won opportunity amounts and display it on the account page itself for easy reference. Reps having visibility into the total amount of closed won deals and the total amount of open opportunities for an account can evaluate where they need to spend time. They can thus engage with high-potential prospects while servicing customer who needs their immediate attention.
- **Automating steps on won deals:** Sales reps often need to update their opportunities once a deal is won. Without automation, sales reps must manually close their deals and send a thank-you note. With Salesforce, the account type gets automatically changed from Prospect to Customer once the sales stage changes, and thank-you emails and crucial onboarding resources can automatically be sent.
- **Easy access - anytime and anywhere:** Reps' ability to access and update information from anywhere enables them to be efficient and make the most of their time.

Reduce Ramp Time For Sales Rep

Most organizations desire to lower the rep-ramp time and quickly get them going. Salesforce enables sales leaders and managers to provide the new reps with real-time guidance on the next steps in the sales process and track rep activity and deal progression.

Sales Cloud offers the following to Sales Reps to achieve success :

- **Access to critical resources in one place:** When taking onboard a new sales rep, providing easy access to essential resources, quick access to the latest critical assets, adding a topic, conversations, and files for reference, etc., helps.
- **Recommendations by deal stage:** Companies have their own sales processes and prescribed essential tasks that sales reps should complete at each opportunity stage. Managers can help new agents learn and understand the critical tasks by stage and allow them to move their deals through the process quickly. They can also engage with the team members at the right time to close their deals rapidly and successfully.
- **Pipeline Analysis:** Sales Cloud 360 provides organizations visibility into the sales pipeline, forecasting future revenues based on all deals in progress. Also, sales managers can track individual deals in a pipeline, allowing managers to know when to step in and guide the reps.

Why engage a Salesforce Implementation Partner?

Just buying the world's best CRM is not enough, the most crucial step is to know how to adapt and customize it for the business with the help of an implementation partner. For a comprehensive implementation, businesses should leverage the knowledge and experience of a partner and thus avail instant access to several years of implementation experience.

The benefits of engaging a Salesforce Implementation Partner are:

- **Agility:** With a partner, Salesforce implementation is fast and smooth. Experts in each domain can collaborate on and define the best solution and implementation/development as quickly as possible.
- **Expertise:** As Salesforce's consultants have exposure to many industries & projects, they can quickly provide a suitable solution to fulfil all your business needs.
- **Best Practices:** To have a partner listen to and implement your needs and learn from other people's successes/failures is a priceless tool at your disposal.
- **Skill Transfer:** Documentation and system administrator training is provided to ensure clients can independently manage, control their data and extend their system long after the project has been completed.

Implementation Process in a Nutshell

Salesforce implementation typically follows the following structure:

1. **Defining the Stakeholders** - Identify the people & entities with a vested interest in the project and whose needs will need to be addressed as part of the implementation. Also, define some key roles and responsibilities for the project, such as business users/end-users, project managers, and decision-makers.
2. **Defining High-level Goals** - Determining the project's goals- the vision should be clear before proceeding.
3. **Gathering Requirements** - Making a list of requirements that should be reviewed and vetted as a group to ensure they meet the standards.
4. **Prioritizing Requirements** - Begin assigning a priority (High/ Medium/ Low) to your requirements and identify what is a "Must-Have" to go live.
5. **Build:** It's finally time to bring the requirements to life.
6. **Testing and Implementation of Feedback:** It's time to get in touch with the business team and the implementation partner to ensure that reality meets expectations.
7. **Preparing for Go-Live:** Taking measures to ensure the transition process is smooth for all parties and training is one such critical aspect - like admin training, user training, etc. before the roll-out.
8. **Go-Live:** On the final day - for a successful deployment, a quick run-through of various key functionalities ensures the system is working as expected.

Tips for a successful implementation

- **Define requirements** - Having precise requirements enables proper implementation. Implementations usually go wrong when reality doesn't quite match up to expectations.
- **Including Stakeholders early** - If stakeholders believe in the solution being implemented, they contribute better and offer constructive feedback for the improvement of the project.
- **Precise time requirements from the business/end-users** - Business stakeholders must be involved throughout to provide input, feedback, and clarification.
- **Comprehensive testing:** Testing is one of the essential parts of any implementation. Spending appropriate time testing the functionality according to your defined initial explicit and detailed requirements helps the implementation process.

Final Thoughts

A strong CRM system is essential to empower an organization's sales team and make the sales process efficient, and Salesforce provides one such platform. Proper implementation of Salesforce Sales Cloud empowers businesses with the right tools and resources that help keep track of sales team performance and tasks and benefits a business.

Further, with the havoc that the coronavirus has brought to the global economy and its effect on businesses worldwide, it's time to embrace a powerful CRM system like the one provided by Salesforce and protect your business today.
