



The Ultimate Guide for successful **Salesforce CRM** Implementation

salesforce

Table of **CONTENT**

01 ▶

What are the barriers to Salesforce CRM success and how to overcome them?

02 ▶

What are the pro tips to aid you in vendor selection and Salesforce implementation?

03 ▶

How to ensure your Salesforce implementation is a success?

04 ▶

Conclusion

05 ▶

About the Company

INTRODUCTION

Prior to acquiring or changing your existing CRM system, it is important to consider some fundamental rules for a successful CRM implementation and to talk about the marketplace that your CRM will service in the years to come.

The way customers interact with the organization has revamped. Businesses today work in a highly competitive market. Varying customer expectations and behaviors require an innovative approach in order to sustain successful organization growth.

According to Gartner, more than 60 percent of companies that have implemented CRM did not have mutually agreed upon goals for their projects prior to the installation. Like a building without a bearing wall, a CRM initiative without goals will topple.

This whitepaper will help teams involved in Salesforce implementation to focus on key strategies. In short, it is meant as a support for making good Salesforce implementation choices based on proactive planning.



CHAPTER 01 —

How to overcome the barriers to Salesforce CRM success?

Adopting any new CRM system is, of course, a bit daunting. It is obvious that there are going to be many barriers if you're switching to another CRM. These include the cost of transition, the time it will take to train your sales team, poor design and difficulty of use, dirty data, and many more. Due to these hurdles, many organizations struggle to introduce CRM systems successfully. For the benefit of our users, I am sharing some ways to overcome these challenges.

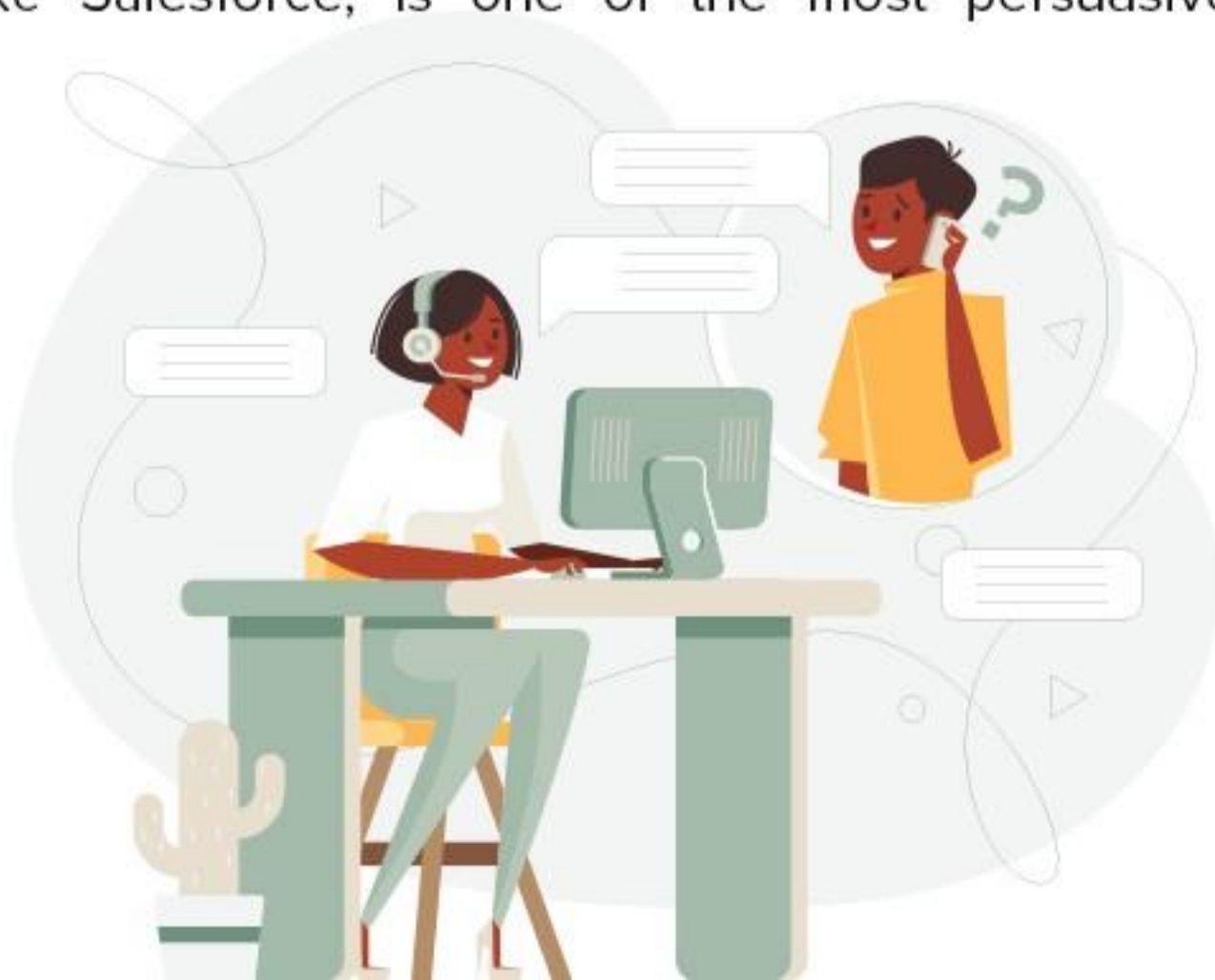
Below, are the three common CRM challenges and solution on how to solve them successfully.

Challenge 1 Imprecise business objectives

If you are unclear whether the results will be positive enough to dive into another CRM. A CRM system is not just an IT solution to be bought and implemented but it is a business strategy level change. This challenge occurs when you lack on the planning front.

Solution 1

Understanding the CRM solution fully even before adopting or switching to a new one like Salesforce, is one of the most persuasive solutions to



this challenge. This will, in turn, help you to formulate and successfully implement long term strategies as well as streamline the process. Additionally, the CRM implementation team needs to go to the ground and interact with other employees. This will help them identify various unforeseen challenges that may hamper the implementation process. Furthermore, interacting with employees will help them determine the suitability of the system to the organization.

Challenge 2 **Employee Resistance to Change**

Not all employees will embrace the change in switching to a new CRM platform (like Salesforce). This resistance may hurt the overall performance of the organization.



Solution 2:

Enlightening the employees on the benefits of implementing the Salesforce will help to significantly counter the passive resistance and increase employee-adoption rate. Strive to not only convince the team to embrace the change but also create and maintain their enthusiasm and desire to learn more about the system. Communication is the key here.

Challenge 3 Implementation Cost

This is one of the most common problems faced by small, medium and large organizations. The cost of buying and installing Salesforce, not to mention the cost of training your employees on how to operate it (and the time lost as they are not working at full speed and potential) is enough to make many companies skeptical to take on the risk.

Solution 3

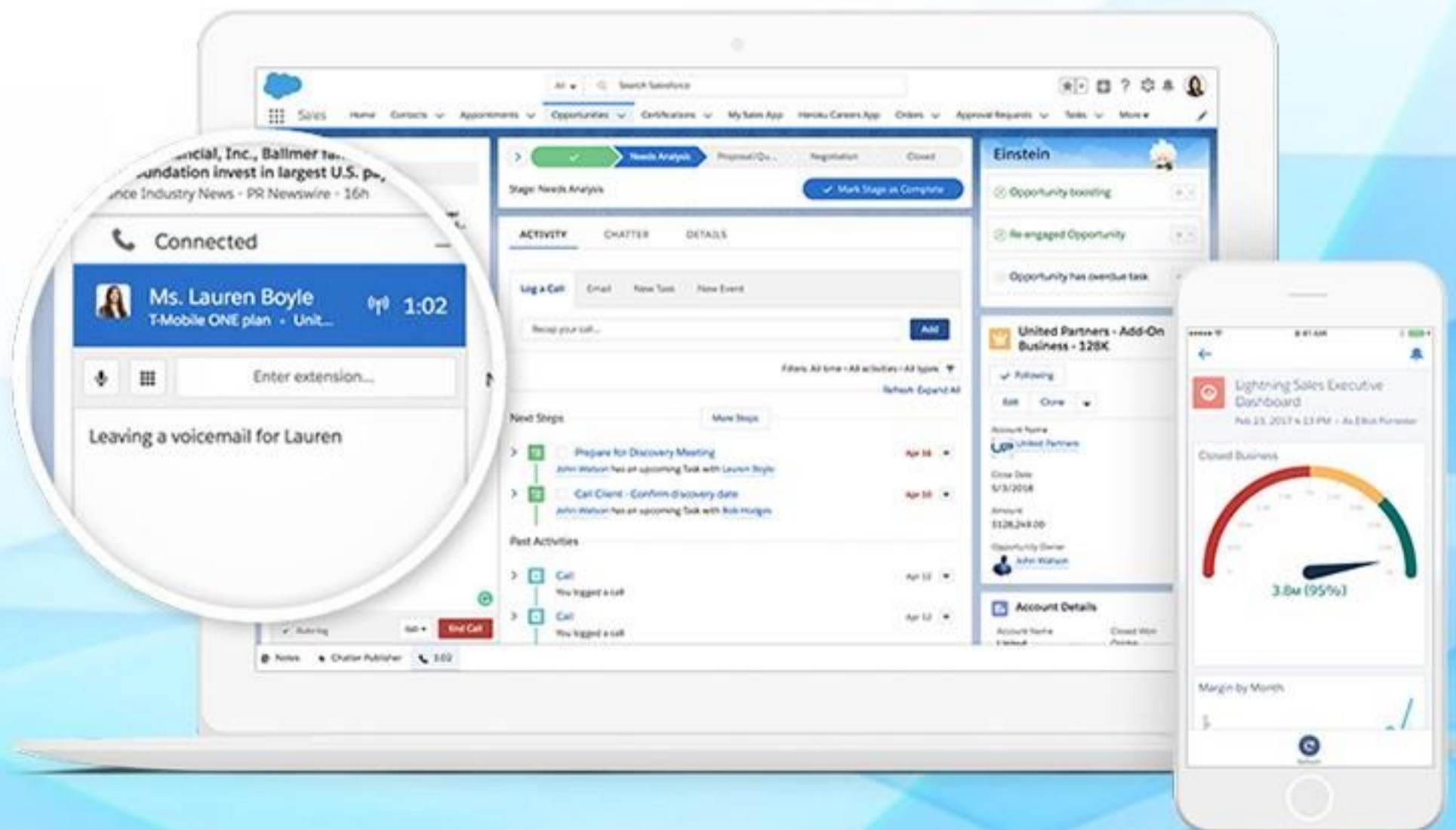
First, it is important to consider the total cost of purchasing and implementing Salesforce when preparing your annual or monthly budget. Compare and contrast the cost before making your final decision so as to choose a CRM system like Salesforce that is affordable and in line with your budget.



CHAPTER 02

What are pro tips to aid you in vendor selection and Salesforce implementation?

The Salesforce AppExchange currently offers nearly 3,000 apps and consulting firms and vendors offer dozens more that are not listed on the Exchange. How do you sort through them all to find exactly what your organization needs? And once you find a right Salesforce vendor, what should you look for before you implement it? Here are a few handy pro tips to help guide you.





START

PRO TIP 1

If you can't think of any major reasons as to why you need a CRM, you probably don't. Not everyone is in a position to invest in one, and honest salesforce consultants will likely tell you just that during the selection process.

PRO TIP 3

While the IT department shouldn't be the only or even most important factor to consider, user-generated reviews can give you a general idea into how the new CRM functions, support service quality, and more.

PRO TIP 4

Consider utilizing a request for information and/or a request for a quote if you're not ready to utilize an RFP document. These will both give you valuable information to assist in your Salesforce search.

PRO TIP 5

Keep in mind: A CRM system isn't going to solve all of your business's problems. When evaluating your processes, keep in mind what will be changed with the new software implementation and what won't.

PRO TIP 2

Don't forget about your IT department. They'll be crucial to the success of a Salesforce implementation, so bring them into the equation as soon as possible.

PRO TIP 6

You're probably not going to get absolutely everything that you want from a Salesforce vendor. Come into the process with an open mind and be ready to negotiate some of your requirements.

PRO TIP 8

Get references from potential Salesforce Consultants, and have a list of follow-up questions ready. Transparency and communication will be crucial going forward, and references might have helpful feedback for you to consider.

PRO TIP 9

If the Salesforce vendor doesn't offer a lot in terms of customization, it's probably best to look elsewhere. While over customization can be precarious too.

PRO TIP 10

Consider creating a selection committee consisting of expert and individuals relevant to the discussion. This way, you'll be able to share ideas and have a strong support system from beginning till end.

PRO TIP 7

If you find that a Salesforce Implementation Consultant offering is way cheaper than a competitor, do additional research. Just because a Salesforce consultant has cheaper prices doesn't mean it'll be a better deal down the road.

END

CHAPTER 03

How to ensure your Salesforce implementation is a success?

Wherever you are in your Salesforce journey, ensuring that your implementation process is powered by top-notch architectural practices is extremely crucial.

From startups to enterprises, we plot the roadmap to success for your business transformation by developing a [7Cs approach framework](#). HyTechPro offers Salesforce consulting services for development, customization, implementation, migration, integration and more. The firm's digital transformation framework connects with the organizations' HR and BI systems, for extracting information about the customers. The company offers a single platform where all systems interact with one another, making way for better understanding the customers. The blend of features and functionalities highlighted in the package roadmap represents more than just business requirements. This must reflect how everyone in the team should work together in order to transform the customer experience. Thus, Salesforce consultants are able to offer strategic and technical guidance on successful Salesforce implementation.

Here are some points which will help an organization successfully execute Salesforce strategy plus also provide a groundwork that propels innovation.





Data

Having a central view of your customer data across organizational units, localities, specialties, and real-time interactions is no longer a Salesforce dream. Beyond managing your customer data in a technically sound and scalable manner, you must identify ways to map business value to org design and develop for future needs.



Aim high, start small

Enterprises need a clear roadmap and innovative technology, in order to implement Salesforce and evolve contemporary development practices at an enterprise level. The implementation goal must be to deliver solutions with speed and flexibility.



Adoption

From managing architectural reviews to driving change, management can decide the success of a Salesforce implementation project. Salesforce consultants can help you identify the right stakeholder engagement models to drive adoption and maximize platform ROI quickly.



Track your progress

With the data successfully imported to Salesforce, it's tempting to think the project is finished. Not just yet! It's time to make your data actionable. Breakdown the sales team KPIs for each individual sales rep. Make sure each team member knows exactly what metrics they need to hit - number of activities (calls, emails, meetings), monthly sales, number of opportunities, etc. Leading metrics are particularly helpful.

Further, even if you have the capability to deploy a large set of features and functionality at a time, you shouldn't do this. Prepare a roadmap for roll-outs.



Organizational Collaboration

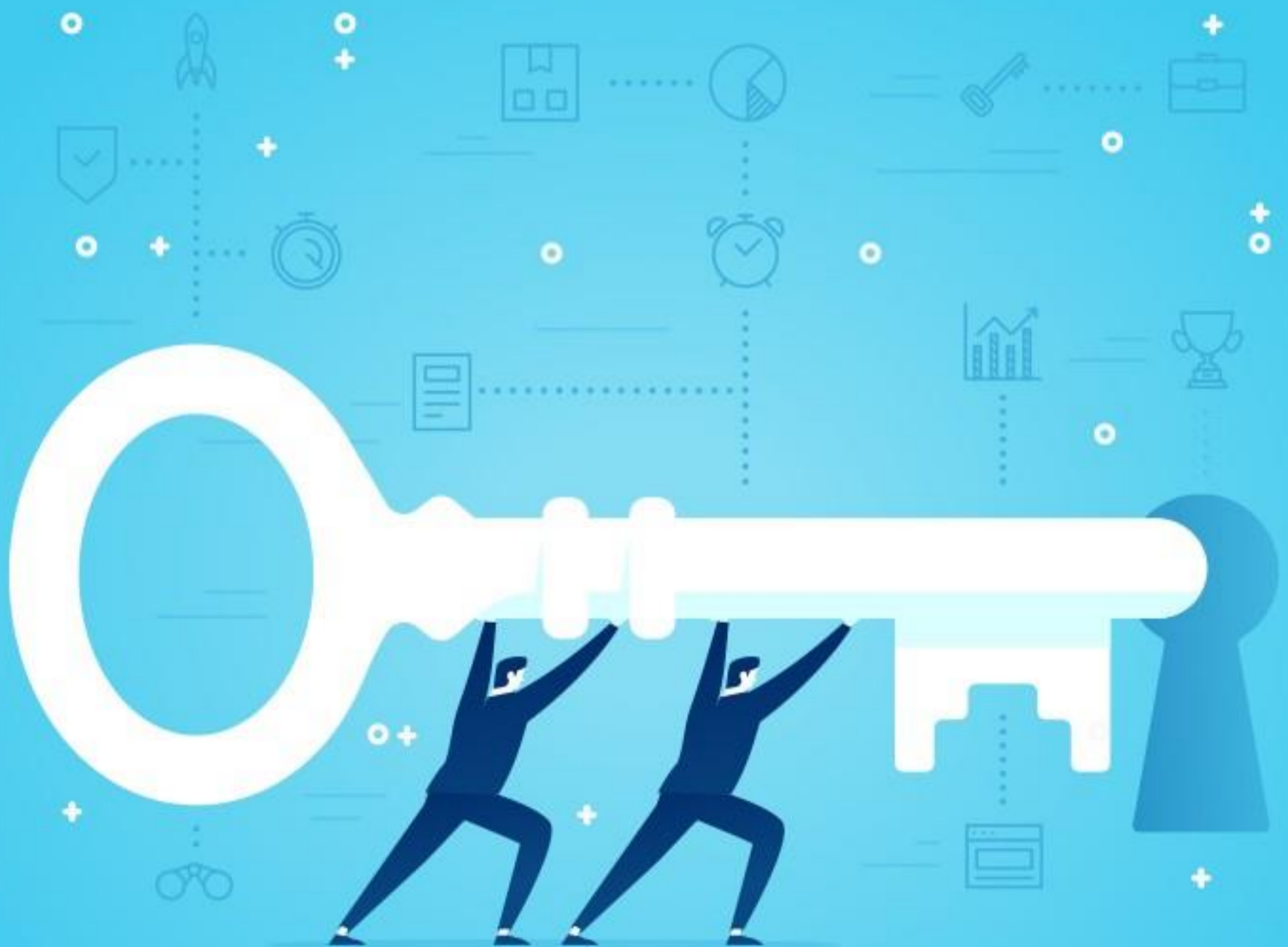
If you want to achieve quick ROI from your Salesforce implementation, you need wider operational changes that influence organizational collaboration & culture. Salesforce consultants can help you understand how salesforce integrations drive transformative organizational changes.

CHAPTER 04

CONCLUSION

Many organizations look to Salesforce to address sales, customer service deficiencies or to respond to requirements from outside sources in activities such as partnering, or inventory management, or pressures to demonstrate compliance to regulations and so forth. The point is that in many times this decision is not a pro-active move, but rather a reactive one. This decision has to be very thought driven and well calculated.

The marketplace and the customer base is transforming for everyone, and as a result, many organizations are looking towards Salesforce to extract the best value from the marketing and sales processes.



ABOUT THE COMPANY

HyTechPro "**Transforming Businesses Digitally**" is a technologically advanced and globally recognized IT company that caters to the digital needs of its customers. Established in the year 2003, we have mastered the art of providing next-generation IT solutions. We are an expert in Salesforce® Consultation. Our mission is to help our customers use Salesforce® better to improve their business with higher efficiency and productivity. We combine the process, resources, and technologies under a single entity to fourfold customer satisfaction.



7520 Standish Pl #265 Rockville,
MD 20855



Toll Free US (+1) 888-683-8281



askus@hytechpro.com

