



**100 *More* Tips for  
Salesforce® Success  
for Mid-Sized &  
Manufacturing Businesses**

**By Ron Cowan**

**100 More Tips for Salesforce® Success  
For Mid-Sized & Manufacturing Businesses**

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# I. Introduction

Mid-sized businesses face unique challenges: individual employees may be spread thin and perform a wide-range of tasks, sales territories may not be clearly defined, and processes and procedures often remain undocumented, ad-hoc and inefficient.

In our work helping these companies to configure and use Salesforce effectively, we often see recurring issues (regardless of the industry) which we work identify and address. The benefits to these companies of using Salesforce will greatly outweigh the cost.... and often the expense of implementing Salesforce (if done wisely) is not nearly as prohibitive as many mid-sized companies expect.

Properly implemented, Salesforce will increase your sales, marketing and customer service productivity. Accumulating and organizing information about your customers and prospects in the correct way, will provide you with unparalleled business insight.

In our experience, there are three critical areas to focus on, that will lead to a successful implementation.

1. A User-Friendly Configuration
2. A System Pre-Populated with Useful Data
3. Effective User Training

Every business can benefit from implementing Salesforce. Our goal is to help you get the most value out of the system you have purchased!



## II. Setting Up Effective Sales Territories

Mid-sized companies have limited sales resources. Salespeople are often remotely located and dispersed in a way that does not allow for full geographic territory coverage. Salespeople will have limitations in the areas they can easily access, as well as industry-specific biases in choosing the specific companies they may call on.

The result is that high potential opportunities which emerge in out-of-the-way locations, or unfamiliar industries may be neglected. In order to set up effective sales coverage, there are many factors to consider.

In the explanation that follows, we are going to refer to any potential customer as a 'prospect' regardless of whether they are a customer or not, as well as whether they are a Salesforce 'Lead' or 'Account' record type.

### 1. Define the Total Universe of All Your Prospects

You should begin any sales territory assignment project by first developing a comprehensive list of all the potential customers & non-customers that exist and where they may be. Many companies approach the structure of sales territories around the customer data that already exists in their accounting or internal systems. But *customers* are only a

subset of the total available universe of those who *could be buying* from you.

## **2. Ensure Salespeople are Proactive**

Salespeople at many medium-size businesses often primarily *react* to incoming leads, calls and emails, as opposed to *proactively* identifying and calling on new and unfamiliar prospects. Salesforce provides a fully relational CRM system to organize leads and prospects, index and prioritize them in a more robust way than can be done using spreadsheets, or personal contact management systems.

## **3. Use Lead Assignment Rules**

In Salesforce, prospects may be Leads or they may be Accounts (two different record structures). If you are using Leads, be sure to implement the lead assignment rules which allow for assigning prospects to a specific individual based on certain criteria such as zip code, state or even an industry classification.

## **4. Assign Account Ownership Based on Territory Coverage**

Accounts in Salesforce need an 'owner' which is someone that the specific account record is linked to. Often accounts are not 'owned by' the correct salesperson which can prevent them from actually seeing the account record. If you have a salesperson who covers a certain state, then be sure that any account record in that state is assigned to the correct salesperson as account owner.

## **5. Beware that Current Customers may Present Biases**

Perhaps you had a strong sales presence in one industry or certain territories due to historical business reasons or some anomaly. Analytical models to determine territory coverage using only your *current customers* will provide incomplete information to plan with. Step back and take a very big picture view of anyone and everyone who could potentially be buying your products or services, and then work backwards to identify the specific slices and segments.

## **6. Prospecting Lists Should Reflect Today, not the Past**

Many medium-sized businesses confine their prospecting activities to *existing (or inactive) customers* that they have a current or past relationship with (or these may be the only prospecting records they have access to). These customer lists are often extremely outdated and are often a very poor source of prospects to spend time on. Purchasing new lists through reliable data sources and providing appropriately indexed Leads in Salesforce, then allocating them in a balanced way through record ownership to the sales team, ensures that targeted sales efforts are consistently focused on only the best prospects.

## **7. Ensure Sales Efforts Target the Most Profitable Customer Segments First!**

Many salespeople at medium-sized businesses lack access to any business intelligence data identifying the most or least profitable customer segments.

In addition, remotely located salespeople do not have access to internal accounting systems that could potentially provide this information.

Identifying and creating an Ideal Customer Profile (ICP) and indexing records in Salesforce by sales priority such as A,B,C,D, etc. (more about this to follow) for sales teams to prioritize and focus on, can provide dramatic sales increases and avoid time spent on unprofitable or unworthy prospects or market segments.

## **8. Segment Your Customers and Identify Dormant Customers**

You have customers who are actively buying and many who have stopped buying. Define a criteria for an 'inactive' customer. Typically, an inactive customer is one who has not purchased 'recently' and the definition of 'recently' can vary depending on the industry and product or service you offer. Pick a timeframe (such as no purchases in the last 24 months) to define this group.

## **9. Rank and Code Active Customers**

Once you have defined active and inactive accounts, develop a criteria to rate the accounts remaining active such as by A, B, C or D. You can use prior purchase volume to establish this rating, such as an 'A' account being a customer who purchased 'more than \$xxxx' in the prior year.

All A and B rated account total purchases in the prior year should together represent 70-80% of total prior year sales. D customers should represent not more than 10% of the total sales in the prior year. C & D customers together should be about 20% of the total sales.

## **10. Add Additional Classifications**

Your customers likely span many industries or other classifications. Segmentation can be by industry, business type, company size, ownership type, etc.

If you begin to classify your customers be sure to be thorough (meaning all records should be classified). You may approach territory assignment not by geography, but by a specific industry group. Therefore, it is important to be as thorough as possible in your indexing of records to get the right count of the potential universe of customers and prospects.

## **11. Purchase Non-Customer Data to Fill in the Gaps**

Don't rely on salespeople to create prospect lists. This will result in spotty data and give an incomplete view of the true universe. Once you have defined that you can legitimately sell your product to all businesses in X, Y and Z industries, and within I, II and III geographies, you need to obtain a comprehensive list of all potential prospects. Purchase compiled lists from reputable list vendors which can provide a comprehensive list of every potential prospect spanning those industries or geographies. Ideally, you need to 'scrub' this purchased list against your current list of active and inactive customers to avoid duplicate names and obtain your 'net' prospective non-customers.

## **12. Think Globally and Define All Sales Channels**

Even small companies conduct business globally today. That is why territory planning should take a big-picture view. Anybody, anywhere who can purchase your product or service should be considered when designing sales territories.

Once you have completed the indexing (ABCD and any other industry segmentation) and have obtained a comprehensive list of non-customer prospects to enhance your lists, you can better plan how to sell. There are many sales channels in addition to your own direct salespeople such

as outsourced call centers, distributors, resellers, independent agents, contractors and self-service via eCommerce.

### **13. Slice and Dice Your Segments**

By slicing and dicing and indexing your active and inactive customers and prospects (who are also not customers) - you will create the ability to assign groups of them to specific channels. For example, all 'C' customers in Industry 'Y' may be assigned to an inside sales team while all 'D' customers in geography 'III' are designated to only self-service through the website (because purchase volume or profitability does not justify assigning a salesperson).

### **14. Allocate Records Evenly**

Ensure you take a data-driven approach to assigning accounts. Once you have your segmentation and list of customers and prospects, ensure you allocate them evenly among salespeople or sales teams. If you have 50,000 total customers and prospects to allocate among 25 salespeople, simple math dictates that each person should receive 2,000 records each. But in our work with clients this is not always the case; we often see one salesperson assigned an enormous number of accounts, while others will not be assigned enough records to make their sales goals.

### **15. Include Consideration of Prospects in Territory Account Allocation**

And be sure the ratio of customers (active and inactive) and non-customer prospects are evenly distributed. Companies frequently assign records disproportionately by only focusing on active customers, leading to some sales territories having enormous opportunities, while other territories have so few it will be impossible for the individual to succeed. Mapping software tools can help visualize account assignments.

## **16. Establish Rules for Resolving Account-Territory Conflicts**

Account conflicts will inevitably occur; someone will be selling to a prospect that is a business unit of another salesperson's larger national prospect. Setting up clear guidelines for how potential disputes will be handled are critical. Nothing demoralizes a salesperson more than feeling they have been unjustly denied a sale for a seemingly arbitrary reason.

## **17. Update the Account Record Ownership When Salespeople Depart**

Be sure to reassign records when a salesperson departs because salespeople will come and go. And when that happens, the *actively buying customers* are often assigned to another person to take care of. But don't forget to assign the *inactive and non-customer* prospects as well, to keep the territories balanced. Ensure that all customers and non-customers you have defined are assigned to an active salesperson or sales channel.

## **18. Create Annual Maps to see Account Locations in Relation to Your Salespeople**

Have your salespeople moved since the sales territories were originally created? Companies frequently hire salespeople because they are strategically located in the middle of a specific sales territory. Then the salesperson moves. In our mapping analyses, we have seen numerous situations of salespeople traveling through one, and even two territories to get to their assigned territory. In another case we saw three salespeople living close to one another in one territory and traveling out to their assigned areas daily.

Over time, the location of your existing salespeople will change as reps come and go - and even existing reps will surprise you with major moves you did not know about - but often the territory boundaries don't change. Take this into account by doing an annual mapping exercise to see where your important accounts or strategic prospects are located and who is best positioned to cover them.



## III. Classifying Your Account Records

### 1. 'Accounts' Are Not Always *Customers*

An Account record can be an active or inactive customer, or a prospect you hope to do business with (a non-customer). In Salesforce terminology, an 'Account' means 'a record', but not necessarily a 'customer'. This often confuses many Salesforce users into thinking that all 'Accounts' are all actually already customers.

### 2. Index Accounts as Active or Inactive Customers

Our recommendation is to first index all Account records as either an active, inactive or non-customer. This helps in all kinds of ways; territory assignments can be more accurate, and you can also identify when accounts become inactive customers and determine why quickly.

The most common criteria we use is the following:

- 'Active' customers have purchased in the current or prior year
- 'Inactive' customers are those who have not purchased in the current or prior year... but have purchased within 4 years
- 'Non-customer' is anyone who has not purchased in five years or more... or never purchased at all.

### **3. Index All Active Customers as A, B, C, D**

Rating your active customers as A, B, C, or D helps prioritize. Perform an ABCD analysis of all past customers who have purchased in the full prior business year. Then determine appropriate thresholds to classify these customers as either A, B, C or D based on purchase volume ranges.

For example, you may find that your customers each purchase anywhere between \$250 per year (the smallest customer) and \$550,000 per year (your largest customer). So, an example range for a 'D' Customer might be someone who purchases between \$250-\$1,999. The resulting ratio helps calibrate where sales effort should be exerted.

### **4. Ensure Sales Effort is Appropriate to Customer Size and Potential**

While we love all our customers, business leaders typically know intuitively there is a 'more desirable' and a 'less desirable' type of customer. But these characteristics of what makes for a 'better customer' (which are so intuitive to the sales or marketing leaders) may not be communicated down to the sales teams. Salespeople may exert disproportionate sales effort towards customers who may always remain small accounts.

### **5. Use the 80/20 Rule**

Our analysis typically shows that the 'A' customers represent a very small number of accounts by count, but a large proportion of total sales by dollars. Conversely, the 'C' and 'D' customers represent a large volume of customers by count (often 80% of total accounts) but only a small amount of total sales by dollars (often as low as 20%).The value of

knowing this ABCD customer split ensures that 80% of the sales efforts are not targeted to accounts who can only generate 20% of total sales.

## **6. Apply a Rating System to Your Account Records**

Lead rating is the process of scoring or rating your *leads*. In recent years there has been a proliferation of marketing software programs that will apply a score to *leads* based on various attributes, typically how a lead responds to your marketing campaigns.

But rating your *Account records* can also be highly valuable. First you need to determine criteria for these ratings. Adding scoring to Accounts has had a dramatic impact on increasing sales for our clients because it helps salespeople, marketers and managers focus specifically on the highest scoring Accounts most likely to result in sales. Characteristics to look for on Accounts include:

- Two or three favorable industries
- Are they a Previous Customer?
- Are they Adding New Employees?
- Is there New Leadership?

Note that these specific questions are very objective and can be answered by obtaining data from specific and reliable sources

- Previous customer knowledge can be obtained from the accounting system
- Identifying if a company is hiring new employees can be seen inside Linked-In® (subscription may be required)

## **7. Don't Ignore International Account Records**

Even small companies conduct business globally today. If you don't have an international sales force directly, you may have a distributor or agent channel in other countries. We often see international Account records in Salesforce which are not assigned to any salesperson because those areas are covered by third-party agents or distributors (not direct employees) who are not able to log into Salesforce.

Be sure there is a process to provide these international account names to your international distributors or agents. These names may be hugely valuable to them, and they may have no idea these account names are in the system.



## IV. Utilizing Lead Functionality

Lead handling procedures can often be dramatically improved by using Salesforce standard functionality and some common-sense improvements to business processes.

### 1. Don't Use an Email Address to Receive Leads

Many medium-sized businesses will post an email addresses such as “sales@ourcompany” on their websites as the way to receive new inquiries. But there are numerous problems that occur when posted email addresses are used:

- The email address may become disconnected from a recipient or go completely unmonitored
- Leads that arrive as emails require re-entry into another system or spreadsheet which is time consuming and may not actually happen
- If multiple people monitor the email address, one person does not know if the other has responded to the lead. Someone may assume an email marked as ‘read’ has been taken care of when it has not been responded to
- Leads that are actually ‘inquiries’, such as for international distribution or partnerships and business development may be mishandled or not responded to at all

## **2. Use the Salesforce Web-to-Lead Feature Instead of an Email Address**

The Salesforce Web-to-Lead functionality is an easy to create web form which can be posted on your company website, capturing all the lead fields and instantly creating a Lead record inside your Salesforce system.

## **3. Ensure all Leads are Maintained and Managed Inside Salesforce**

When someone fills out the lead form on your website using Salesforce Web-to-Lead functionality, a lead is automatically created inside Salesforce instantly. The Salesforce web lead form is embedded as code in your website. There is no need to re-enter the data from an email or another web form system and data fields are harmonized between the web form and the Salesforce lead record. Companies are typically aware quickly if there is any disruption in the flow of leads (this is not always the case when using alternate forms which just feed an email box).

## **4. Use Lead Assignment Rules**

Once the lead is inside Salesforce, it can be routed using standard rules and workflows and requires no duplicate data entry. Web leads arrive instantly and can be routed to the appropriate salesperson using assignment rules.

## **5. Limit the Number of Requested Fields in Lead Forms**

When you implement the Web-to-Lead form, request as little information as you need; the more you ask for, the more likely it will not be filled in, or worse- will be filled in with garbage information.

Many lead inquiries today originate on mobile devices which make completing long lead forms or typing answers to questions difficult or annoying. Using pop-up lists with pre-set answers will help gather information in an organized way. Simply asking for four items: (name, company, email and zip code) can give you all the information you need to qualify the lead. You can enhance the lead yourself by reviewing the individual's information on Linked-In®.

## **6. Include a Buying Device in Auto Replies to Leads**

With Salesforce Web-to-Lead functionality, you can send the inquiry an auto-response. There may be a delay in your manual ability to respond and your lead may want to purchase *now*. If you have a product that cannot be transacted immediately online, include links in an auto-reply email to self-service mechanisms such as web presentations or self-running demos to let the customer educate themselves. Include direct links to online documents such as forms needed to purchase, etc.

Your lead may be ready to send in the purchase order now; why make them wait until a salesperson gets back to them? Give them the documentation they need through automation to make the sale happen.

## **7. Have a Defined Process for 'Miscellaneous' Leads**

Miscellaneous leads typically include a hodge-podge of partner, business development and international distributor or agent inquiries.

Even small companies conduct business globally today. If you don't have an international sales force directly, you may have a distributor or agent channel in other countries and these inquiries may be valuable to them.

Finally, many companies think that “Names” are “Leads”. Company ERP or Accounting systems are often full of names which are then loaded into their CRM systems. In addition, companies often purchase additional names to load in as well. But these are really just names only, and not leads. Tagging appropriate statuses on these names will help differentiate between what is an unverified name, versus a true lead to begin sales efforts to.

## **8. Identify Important Characteristics About Role & Authority, not Just Title**

‘Title’ is a standard Salesforce field when using Leads and Contacts. But today, titles are not necessarily indicative of a person’s scope of responsibility, and not helpful if we are looking for the true decision maker. Many people may have the title ‘Analyst’, ‘Human Resources’ or ‘Engineer’ but who really is the engineer *with the buying authority*? What is the ‘Operations Manager’s’ true responsibility? What aspect of HR is our ‘Human Resources’ person interested in if their title is just ‘HR Manager’?

Create a custom field on the Lead or Contact record called ‘Main Responsibility’. This can be a free text field, or better yet, a picklist with multiple values that can be selected. Examples of responsibilities are safety, compliance, inventory management, recruiting, payroll, maintenance, organizational development, etc.

Adding another custom field called ‘Can Individual Issue PO?’ with a Yes/No answer helps prompt salespeople to ask the question as well as notes a level of responsibility that their title may not describe. Noting ‘Is the Individual a Decision Maker?’ with a checkbox or Yes/No answer is also helpful.



## V. Implementing Cases

Frequently, medium-sized businesses do not have a defined process for handling customer support and service issues. The result is that customers contact their salesperson, and the salesperson inadvertently takes on the support task to keep the customer happy.

### **1. Don't Burden Salespeople with Support Requests**

Salespeople, especially field-based salespeople are often one of the most expensive employees a company has. They should not be spending their valuable selling time handling support inquiries, and they often are not resourced to provide support. Salesforce Service Cloud® enables true case management. Tasks can be assigned to an appropriate service or support person who may be a better resource to handle the issue, and free up the salesperson from time-consuming service calls that take them away from their selling activities.

### **2. Don't Use an Email Box for Support Emails**

We often see medium-sized businesses using a single email address to receive support emails; this email address is a catch-all that might be monitored by one person, many people, or worse, nobody at all. There are multiple problems that occur in this scenario; (1) if multiple people login to the same email account, they don't know if a read support email has been answered, or by whom, (2) they may assume a read email has been resolved, or, (3) they may open and read an email with a problem they don't like, or don't want to answer, and just ignore it hoping someone else will open it and help out.

Finally, if just one person monitors the email box, what happens if that person is absent or leaves the company? We have come across situations where the support email address is a black hole that nobody monitors.

### **3. Use Email-to-Case Functionality to Ensure Support Cases Don't Fall Through the Cracks**

By taking the email address and activating the Salesforce Email-to-Case routing function, every email sent to 'support@yourcompany.com' creates a Salesforce case and the content of the email is automatically inserted in the case. Cases are numbered and can be routed to different people or a group of different people (a queue). Reports can be used to monitor the status of cases and ensure they have been responded to and resolved.

### **4. Use Case Queues & Routing Rules**

A Case Queue is a group of people assigned to receive support cases. A queue can be one person, or many people (ideally more than one person). When a case comes into Salesforce (either via the Email-to-Case function or even if manually created), based on certain characteristics within the case or the case topic, the specific case can be sent to a specific queue (via pre-defined routing rules) and the members of the queue can receive a notification.

Common examples of queues include 'Billing', 'Technical Support', 'Account Inquiry'...but there can be dozens of topics and dozens of queues.

## **5. Create Different Case Record Types**

We used the example of 'Billing', 'Technical Support' and 'Account Inquiry' cases as different topics that cases may come in as. This 'topic' can be a simple field on the case that tags one of these categories.

But creating a customized 'Case Record Type' for specific case types gives you much more functionality. You can have very different statuses in each case record type; cases can be routed more effectively and in greater detail for companies with large support teams, and provides for much more robust reporting.



## VI. Effective Picklists

A 'Picklist' in Salesforce is a pre-defined set of values for capturing information in a specific record instead of entering free-form text. A typical picklist example would be, 'Global Region' with pre-indexed values of 'EMEA', 'North America', 'South America', 'APAC', etc.

Picklists are an incredibly effective way to index your data, improve reporting and segmentation, and using them is highly recommended wherever possible in all Salesforce Objects. However, over time and with misuse, runaway picklist values can create many problems.

### 1. Don't Mix Different Questions in the Same Picklist

If you have a picklist called 'Dairy Products', it should contain only dairy products. This may sound like stating the obvious; in 'Dairy Products' you would expect to see values like 'milk', 'cheese', 'butter', etc.

But suddenly, over time, values such as '2%' and 'Skim' start to appear in the picklist values because someone wants more detail. You are now 'mixing' different concepts because you have included a sub-type of milk. This is a common problem. *Countries* appear in 'Region' picklists, *Lead Statuses* appear in 'Lead Source' picklists. If a need emerges to capture more detailed information about milk such as, '2%', 'Skim' or 'Chocolate', an entirely new *sub-picklist* (ideally a dependent picklist) should be added called '**Type of Milk**'.

## **2. Dependent Picklists Improve Reporting and Indexing**

A 'dependent picklist' is a set of values that depend on selecting another set of values first. An example would be a picklist called 'Province' that depended on you *first selecting a country* of 'Canada' (in which case the province list would be displayed). You need to know who buys 2% vs. skim milk. The dependent picklist created when 'Milk' is selected in *Dairy Products* ...opens a second list and forces selecting the *Type of Milk* purchased.

## **3. Limit the Number of Selections Within a Picklist**

Using dependent picklists also allow for fewer and more precise value selections within the picklists. If you have 36 choices, when you try to present a pie chart report you are going to have 36 slices in the pie; some slices will not be visible in the chart because they have been rarely selected, and it will be a very confusing pie.

If you need to provide 36 different values for the picklist, your first selection should have six choices (better pie chart reporting) and then subsequent dependent picklists can have six values each also (more pie charts to present).

## **4. Beware of Repeating the Same Picklists in Different Objects**

Here is an example: In collecting new leads, you ask for the prospect's 'Industry'. Then, when the prospect is converted into an Account or Opportunity, there is another completely different 'Industry' field with different picklist values requiring selection again. It may not even be called 'Industry' in the secondary object...it may be called 'Type of Business' but the goal of the information being requested is pretty much the same....it is just 'Industry' under a different, unharmonized name.

## **5. Methods of Harmonizing Similar Picklists**

There are two ways to resolve the need to have similar picklists in two different objects; (1) harmonize both picklists (ideally using a 'Global Picklist') to maintain the list of values in one place and ensure changes appear in both objects or (2) use a formula field in the secondary object to capture the picklist value from the first object.

Note: When using formula fields to copy picklist values you need to enter 'TEXT' in front of the formula field such as: (TEXT (name of picklist field here)).

## **6. Always Add 'Other' to Picklist Value Choices**

When you create the picklist called 'Dairy Products' and the related values such as 'milk', 'butter', 'cheese', 'ice cream' and 'yogurt', it is likely you have not considered every type of dairy product. What about 'sour cream'? We had not considered 'sour cream' as a category when we created the 'Dairy Products' list because it was not popular enough to include in the picklist values. It is not really cheese, and it is not yogurt. Therefore, ensuring you have a field called 'other dairy products' prevents it being mis-classified as cheese and thus giving you inaccurate cheese numbers because there is no appropriate choice. So now users can select 'other' to categorize sour cream products.

## **7. Add a Free-Text Field Called 'If Other- Please Specify'**

The 'Other' picklist value allows capturing of values which had not been previously thought of or are just starting to emerge as potential options. This is where you would note that the 'other' product you have classified is 'SOUR CREAM'. Another example would be for an 'Industry'

picklist. You have an 'Industry' field with values of 'Healthcare', 'Pharmaceuticals', 'Information Technology', 'Chemical'.

But now you are now capturing new customers and prospects in the '*Cannabis*' industry. This may turn out to be a separate industry worth capturing (and adding to the Industry Picklist) and reporting on, but you would not know this if the prospect was mis-classified and just lumped into the 'Pharmaceutical' or 'Chemical' industry category. That's where 'Other' and the free text for specifying becomes helpful. You can identify new or emerging industries more quickly. Over the years many examples of huge new industries have emerged which required identification for marketing purposes.

## **8. Leverage Picklists to Create Effective Reports & Dashboards**

Creating effective visual reports and dashboards is only possible when you confine answer choices to pre-defined picklists. Allowing a free text field to answer the 'Type of Milk' will lead to entries such as 'Buttermilk', 'Btrmlk', 'Butter-Milk', 'Butter Milk', '2%', 'Two%', 'Two-Percent', etc. all spelled differently. This makes reporting difficult and messes up the graphics. 'Competitor Name' is often a text entry field also. It is more effective to create a picklist with only the significant 'top six' competitors encountered and using an 'Other' field to capture the names of competitors that are not within the big six.

## **9. Identify Free Text Fields to Move to a Value List**

Most fields on most record types are typically text entry fields. If we use 'Competitor' as an example where text entries are made to denote the specific competitor you are up against, over time there are hundreds or thousands of entries. In order to switch our competitor text field to a

picklist with six or eight major competitors, we need to run a report of all the accumulated text values, then sort alphabetically and then clean up the formatting to identify the most frequently appearing competitors.



## VII. Page Layout Best Practices

In Salesforce, the ‘page layout’ is the specific arrangement (or layout) of the fields on the page that the user is looking at when staring at their Salesforce screen. It can be the layout for an Account or Lead, Case or any other type of record data being displayed. In our work with Salesforce clients, we often come across very confusing, and long or obsolete page layouts filled with dozens (or hundreds) of fields that are no longer used, nor relevant to the business today.

### 1. Limit the Number of Page Layouts

Salesforce makes it easy to create different layouts for different users. The problem is that many companies take this layout customization too far. For example, there may be a special layout for Inside Salespeople to use and another for Field Salespeople, and another for Account Managers, but the differences in what each team sees may be slight or non-existent.

There should only be different page layouts if there are *significant differences* in what each user group needs to see. This is because each layout requires maintaining, and over time users many end up seeing wrong layout which often goes undiagnosed. A user seeing the wrong page layout doesn’t know what they are seeing is incorrect, because they have never been exposed to any other page layouts. If their layout is

missing certain data fields, they wouldn't know it. They often only learn this when they are working with a colleague who has a different layout with things they are not seeing.

## **2. Remove Fields No Longer Relevant**

In our work with clients, we have found that two-thirds of data fields are rarely used. When we perform a detailed analysis of field data use by our clients, we typically find that one-third of the fields are populated more than 5% of the time, another third of fields are populated between 1% and 5 % of the time, and fully 33% of the fields are not used at all.

Over time fields become obsolete because they refer to obsolete products, are duplicated somewhere else, were used to track data from a now disconnected legacy system, or simply are there to try to collect very insignificant information (Customer's Favorite Dessert) that never gets collected.

Unused fields clutter up the 'prime real estate' of the page layout and even worse- just confuse users into thinking they perform some useful data gathering purpose when they simply do not.

## **3. Group Similar information in Sections within Page Layouts**

Section naming makes for clean and understandable page layouts. We recently created a custom object page layout that had over 650 custom fields on it (the maximum is 800). These fields were all important to the client. And in order to present them in an effective way, we had to create many sections to group the information into. To keep things organized and navigable, each section should have between 6 and

20 fields; sections should display in the order that information is collected, not out of sequence.

Fields that contain sales numbers should be maintained in the same section of the layout and fields should be grouped in sections that may be appropriate to different users (for example, a series of fields about creditworthiness that are used by the credit department are all grouped into their own section within the page layout).

Finally, remember wherever possible to identify free text entry fields that can be converted to a pre-defined picklist.

#### **4. Limit Related Lists on Layouts**

Related Lists are sections on page layouts that allow for the display of other related objects, such as Opportunities related to the Account or Contacts related to the Case, etc. Simply stated, you should not display related lists that you don't use or don't want users to see.

There are many such related lists (both for standard as well as custom objects) in Salesforce including Files, Notes, Assets, Social Posts, Notes & Attachments, Contact Roles, etc. Many related lists are not actually used...yet may still be visible to users on their page layouts. Displaying certain related lists to users who should not see them can also be a security risk, allowing them to see information contained in the related object that they may not supposed to be seeing.

#### **5. Identify Defective List Views or Lookups in the Page Layouts**

Lookups or Views (also called List Views) may be named 'All Cases' or 'All Accounts' or 'All A Accounts', but in many cases, someone has

added a filter to the 'All Something' view that you didn't know was in there. "All Cases" may actually be filtered to only one case record type, or only one type of status and in fact, is not truly presenting ALL cases but actually only SOME cases.

Defective lookups can be hugely problematic. We have seen situations where thousands of leads or cases are going un-responded to simply because a lookup filter is has been edited incorrectly which causes other users not to see the all the new leads or cases.

## **6. Block Individual Users from Creating Public Lookups**

Individual users have an ability to create their own views or lookups and checking for errors will require the administrator to login as them to review accuracy.

More problematic is when individual users have an ability to create or even share lookups they created with other users (as public lookups) which will create faulty lookups that now all the other users have access to. In some companies, the global views or lookups are editable by any user (they should not be) and this often creates situations where a rogue user adds a filter to the 'All Something' lookup that limits the result.

Global views and lookups should only be created and edited by the Salesforce Administrator or a designated super user who can maintain the integrity of the lookup.



## VIII. Optimizing Opportunities

Opportunities in your Salesforce system are documented sales activities in progress, to indicate and forecast potential future sales. But there can often be very different interpretations by different people, as to what the future sale amount may or may not represent.

The ‘out-of-the-box’ Salesforce opportunity module contains an ‘Amount’ field to indicate the value of the anticipated sale as well as the likely closing date. The combination of closing date and amount is used to generate reporting on how much total business can be expected at some future date.

In our work with Salesforce clients we have done many modifications to the opportunity module to provide better reporting and capture additional data points relating to the potential sale.

### **1. Create a Variety of ‘Opportunity Amount’ Fields**

CRM systems and opportunity forecasting originated in the enterprise software selling world of the 1980s to track the progress of large-sum, long-cycle transactions. At the final close date, the expected total of the entire sale represented the ‘Amount’. But in today’s world, sellers may be more likely to offer a monthly service that costs \$1,995 per month, rather than a lump-sum sale.

Should the opportunity 'Amount' be \$1,995? Or should it be (\$1,995 times 12 months) as an annualized value of \$23,940? Or even a longer interpretation such as the 'lifetime value' (\$1,995 x the length of months an average customer sticks with the product); this would be \$119,700 if a customer continues paying \$1,995 per month for five years.

In these scenarios, we have provided clients with a variety of opportunity amount fields to utilize which can include, 'Monthly Fee Amount', 'Annualized Amount' and even 'Lifetime Customer Amount'. Formula fields can be used to calculate the totals which minimizes the data entry needed by the salesperson.

## **2. Sample or Trial Order Opportunities**

Many companies will need to close a small deal before a complete larger sale can even be considered. The customer may require a trial or sample order. A sample order for product testing does not reflect the full value the opportunity may represent. The customer may need one circuit board for testing before they can commit to buy the 2,000 circuit boards they really plan to purchase.

## **3. Create a Separate Opportunity Record Type for Trial Orders**

There are a several ways of handling trial orders we have found to be effective. One method is to create a separate opportunity record type for a 'Trial Order' that can be tracked through the sales cycle to close and provide its own set of reports that don't clutter up the bigger more valuable opportunities. Automation can be put in that automatically generates a new regular opportunity upon closing-winning the 'Trial Order' deal.

#### **4. Add a Stage Value for Trial Orders**

Another method is to add an opportunity stage called 'Closed Trial or Sample Order' which does not actually close out the opportunity as well as an additional amount field called 'Trial Order Amount'.

When the stage is set to 'Closed Trial or Sample Order' it captures this important first milestone needed on the way to the bigger deal. The opportunity is still considered open for reporting purposes, and can continue through the normal stage categorizations.

#### **5. Use Different Opportunity Types for Transactional vs. Enterprise Sales**

Many companies offer one product, yet sell it in many ways. Let's use electronic circuit boards as an example product. You stock commodity circuit boards that are inexpensive and can sell them by the thousands in bulk. But you can also customize these stock circuit boards if requested. Finally, you will also do complete custom design and engineering of circuit boards from scratch based on customer specifications.

These three variations of circuit board sales opportunities are best managed by using different opportunity types for each. The commodity sale is a simple transaction with few data entry fields needed and a total amount representing the bulk sale amount; the design-engineering sale will have many more steps including a trial sample order followed by a longer sales cycle to obtain the final full amount sale.

## **6. Understand What ‘Amount’ Actually Means to Different People**

Different departments require different information. Depending on who views an opportunity report will define what the user expects to see. Executives typically want to know the ‘lifetime value’ while sales managers want to know ‘real revenue they can expect closed this quarter end’. Finance staff will want to understand what amount they can legitimately recognize based on accounting rules. Finally, sales and operations planning staff may also look at opportunity reports to try to anticipate and plan for future production and deliveries.

## **7. Allow Users to Calibrate the Amount through ‘Confidence Level Ratings’**

Not all opportunities are equally valid. Typically, the ‘Stage’ definition of the opportunity will assign a pre-set percentage likelihood of the deal closing. An opportunity at an ‘initial conversation’ stage may be rated at 15% chance of closing, while an opportunity in the ‘contract negotiation’ stage may be rated at 85% likely to close. Total forecasts will use these percentages to create a total reporting amount.

But stage alone often does not provide enough criteria to value the opportunity. In many cases we have added a rating such as ‘Salesperson Confidence Level’ or ‘Manager Confidence Level’ (or even a formula that combines the two) to assign the percentage likelihood of close and override the stage criteria. This is because other attributes may make an opportunity highly likely to close (or not close) even if it is only at a very early stage.

## **8. Include Anticipated Delivery Date in the Opportunity**

Closed sales that you cannot deliver won't help your bottom line much. Our work with Salesforce clients has in many cases dramatically increased the volume and velocity of closed sales because we consider the delivery realities. Products may require long lead times inside factories with real production limitations, or they may require a service or installation team that is not available for months. One manufacturer we worked with increased the value of their closed opportunities from \$5 Million one year to \$23 Million the following year due to extensive customization of the opportunity module we provided. The sales problem was solved, but a production problem began due to limited manufacturing capacity.

We then modified the opportunity module to track not just the expected deal close date, but also the first date that product shipment was expected. From that we could work backwards and use formulas to populate production cycle date fields to assist sales and operations planning staff to manage and plan future production and deliveries.

Finally, due to the very real production capacity constraints of this client, they were able to adjust their pricing and discounting in order to close opportunities which would ship on dates where production capacity was available.....and to quote higher pricing when production capacity was limited. The result over three years was dramatic. This mid-sized manufacturer rocketed from \$18 Million in annual sales to over \$50 Million in sales.

## **9. Email Prospects with Open Opportunities to Close Deals**

Many companies use email alerts to their internal employees to remind them to call back prospects, or to follow up on deals soon to close, or to consistently badger new leads that they haven't heard back from.

Our recommendation is to first put expiry dates on all created proposals and a corresponding date field on the opportunity related to the specific proposal ('Proposal Expiry Date'). Then by setting up a 'Prospect Quote Reminder Email', an automated alert takes over and 'gently' reminds the customer that 'their quoted price expires in 7 days', or 10 days or 30 days, or whatever. This does the work for the salesperson. It is also helpful in situations where a salesperson may have left the company, and nobody is following up in a timely way on those outstanding opportunities.



## **IX. Adding Scoring to Opportunities**

Many Salesforce users are familiar with marketing techniques which apply a score to potential leads. For example, a prospective lead that opened two marketing emails with a link to an interesting whitepaper would earn scoring points and eventually when the score reached a pre-determined level, the lead would be deemed qualified and then escalated.

### **1. Gather Key Stakeholders to Agree on Scorable Characteristics the Best Opportunities**

Adding scoring to Opportunities has had a dramatic impact on increasing sales for our clients because it helps salespeople, marketers and managers focus specifically on the highest scoring Accounts, or Opportunities most likely to result in sales. In addition, by using scoring attributes, the method of determining who is the best prospect or opportunity is less likely to be subjective or open to various interpretations or based solely on the opportunity with the 'biggest amount'.

In one evaluation of closed opportunities, we found that a certain client was much more likely to close a deal in Accounts that they had 'previously sold to', where the prospect 'was adding new employees', or

had a 'new leader'. So we added these three clearly important characteristics to the opportunity and the salesperson needed to check:

- Are they a Previous Customer?
- Are they Adding New Employees?
- Is there New Leadership?

Note that these specific questions are very objective and can be answered by obtaining data from specific and reliable sources. Previous customer knowledge can be obtained from the accounting system, while identifying new employees can be seen inside Linked-In® (Note that a premium subscription may be needed).

## **2. Determine a Scoring Value**

Once the checkbox & picklists have been determined a score needs to be determined. For example:

- (if a) Previous Customer (5 Points)
- (if Company is) Adding New Employees (5 Points)
- (if Company has) New Leadership (5 Points)

## **3. Create Corresponding Checkbox Formula Fields to Provide the Score**

For each of these checkboxes, a corresponding FORMULA field (hidden on the Salesforce page layout) will need to be created called:

- Previous Customer Checkbox Score
- Adding New Employees Checkbox Score
- New Leadership Checkbox Score

The FORMULA for these fields (Checkbox Fields) will look like this:  
IF(Previous\_Customer\_c,5,0)

#### **4. Scoring Picklist Answers**

The process for scoring picklists is similar. Let's say you have found that when analyzing past opportunities that you have found greater success selling into companies that are privately owned than you have had selling into large public companies. Here is an example of potential picklist values to score a selection on a field called 'Corporate Ownership Type'.

- Publicly Traded (2 Points)
- Subsidiary of Foreign Owned Co (5 Points)
- Privately Owned (10 Points)

#### **5. Create Corresponding Picklist Formula Fields to Provide the Score**

For this PICKLIST field, a corresponding FORMULA field (hidden on page layout) will need to be created called 'Corporate Ownership Type Score'. The FORMULA for this answer (Picklist Value Fields) will look like this example:

```
IF(ISPICKVAL( Corporate_ownership_type, " Privately Owned "), 10,  
IF(ISPICKVAL( Corporate_ownership_type, " Subsidiary of Foreign  
Owned Co "), 5,  
IF(ISPICKVAL( Corporate_ownership_type, " Publicly Traded"), 2,  
0))
```

The above formula will score the opportunity with 10 points if the 'Corporate Ownership Type' of 'Privately Owned' is selected, but only 2 points if 'Publicly Traded' is selected.

The assumption here is that we are more likely to close an opportunity to a prospect company that is privately owned which is why we give a higher score.

## **6. Create a Corresponding FORMULA Field called ‘Total Opportunity Score’!**

This field should be VISIBLE on the Opportunity page layout. The FORMULA for this field will look like this:

Previous\_Customer\_Score\_c + Adding\_New\_Employees\_Score\_c +  
New\_Leadership\_Score\_c + Corporate\_Ownership\_Type\_Score\_c

So, in this example, if the following items were checked:

- ✓ Previous Customer (5 Points)
- ✓ Adding New Employees (5 Points)
- ✓ Picklist Value of Corporate Ownership Type = ‘Privately Owned’ (10 Points) is selected.....

The Total Opportunity Score would be “30”

Now that you have a Total Opportunity Score, you can filter records and create reports based on looking for open opportunities that have higher scores.



# **X. Creating Effective Dashboards**

When working with clients we often come across dashboards that are neglected, presenting inaccurate information, or are just plain confusing. Dashboards offer tremendous potential but in order to be useful the graphic that the dashboard presents must immediately send a clear message that will drive certain behavior. Pretty images or graphics that are confusing or overwhelming don't drive any actions.

## **1. Design Dashboards Around Specific Users or Specific Functions**

Support employees will need to see different information than the marketing or sales users. The first step is to consider the audience for the specific dashboard. Is the dashboard for senior management only? Is it the sales team? Is it the marketing department? This allows for an obvious starting point for naming the dashboards, deciding who should have access to see it and what you want to convey in the graphic.

## **2. Naming the Dashboards**

There should be a consistent naming convention to any dashboards you create. We often see dashboards with names such as 'Daily Dashboard', or worse... 'Molly's Dashboard' with a hodge-podge of graphics representing all kinds of different business metrics. A more

effective name for a dashboard would be 'Daily Opportunity Tracking Dashboard' or 'Monthly Lead Handling Progress Dashboard'.

### **3. Dashboards Should Drive Action**

A dashboard is a collection of multiple graphics driven by multiple reports under them. Graphics can be impressive and colorful and dashboard creators can get carried away. We frequently look at client dashboards and cannot determine what the dashboard is supposed to accomplish. The goal of any dashboard is to provide a set of graphics that when viewed, provide a visual representation of reports *designed to drive action*.

If the goal is to improve support efficiency, a dashboard should show comparisons on how cases are handled. Does one person handle more cases than the others? Does one type of case take particularly long to resolve?

If you are trying to increase salesperson activity, dashboard graphics that compare salespeople against each other can provide great motivators to the salespeople to do more. But only if the graphics are presented in a way that will convey this data. A salesperson seeing a bar graph that shows their activity level being way below other salespeople requires no discussion. The graphic alone conveys a message and will drive action. But showing them a graphic of their own activity without a comparison to their peers' activity conveys nothing and will drive no action.

#### **4. Ensure the Dashboard Name and Underlying Report Filter is Presenting the Same Data**

Dashboards contain multiple graphics driven by multiple reports. These graphics each have a place to enter a dashboard ‘Title’ which is fixed but *does not get automatically updated if the underlying report powering the dashboard gets modified*. These discrepancies become obvious when a dashboard graphic is titled ‘2018 Sales by Rep’ and it is already 2020. It is more problematic when the dashboard is titled ‘All Global Sales YTD’ but it is only showing USA sales (not ‘All Global’) because someone has modified the report underlying the dashboard.

#### **5. Reports that Power Dashboards Should be in Restricted Access Report Folders**

We typically see reports used to power dashboards stored in the Unfiled Public Reports folder which gives all users access to these reports. To prevent other users from changing reports that are linked to providing the dashboard graphics, create a special report folder called ‘Dashboard Reports’ that has restricted access to most users. This prevents users from changing any reports that are powering the dashboards.

#### **6. Different Users Require Different Reports**

Salespeople need reports to help manage their customers. Sales Managers need reports to manage their *Salespeople*. Many administrators will simply clone similar reports for different users without considering the goals of the actual user.

## **7. Be Aware How Your Users Access Reports.**

Many users now access reports on mobile devices where the visible portion of a report is much smaller than on a computer screen. Consider creating a secondary set of reports called 'XYZ Report - Mobile Device Version' which show fewer columns of information than the standard 'XYZ Report'.

## **8. Each Report Should Drive a Specific Action**

Name your reports in active tense. Calling a report 'HAVE NOT REPURCHASED THIS YEAR' is more effective than simply calling it the 'Customer Sales Report'. It draws your users to the report and clearly communicates the purpose of the report. Similarly, 'MULTIPLE OFFICE VISITS BUT ZERO SALES YTD' is more effective and actionable than 'Notes on Accounts'.

## **9. Focus on Only One or Two Key Metrics per Report**

Administrators sometimes attempt to fill reports with a dozen or more columns of data. This makes the report unwieldy and confusing. Decide what the specific focus of a report should be and create it with this goal in mind.

## **10. Ensure the Report Drives the Desired Action.**

When the salesperson runs the 'NOT REPURCHASED THIS YEAR' report, the desired action should be obvious; a list of accounts to immediately go and see. Such a report should include the information the salesperson needs such as the name, address, telephone number, fax, etc.

Providing the report with only an account name makes it difficult for the user to immediately take actions as they will have to find the missing data in some other report.

## **11. If Possible, Use Transaction Data in Reports**

Most Salesforce reports are built on information which is updated by the user. Notes and Opportunities are examples of ‘user entered data’. User entered data is always subject to errors, omissions, exaggeration and sometimes deliberate misinformation.

Any data which can be used in a report that is based on a verified transaction is more reliable. Transaction data is ‘true data’ that represents some type of confirmed transaction (typically an ‘invoice’ which represents a shipped sale). But invoices are not the only type of transaction data available. Many companies now track salespeople’s mileage using a mobile app that automatically notes every address location they stop their vehicle at. This type of transaction data can be matched to the address on a Salesforce record to tag a vehicle stop as ‘a prospect visit’ and is much more reliable than hoping the salesperson makes a manual note of every prospect visit.

## **12. Organize Reports into Relevant Folders**

Develop and follow a pre-defined naming convention for report folders. Prioritize the order of report folders by putting a number in front of the folder name such as ‘1.1 Daily Sales Reports, 1.2 Daily Support Reports’ etc. You can always reorganize the folder by changing the numbers which reorders the folders, whereas the default is that the report folders show in alphabetical order by folder name.

### **13. Create a Folder for Allowing Customization of Reports**

If the reports you create for users are read-only, create a specific folder which contains reports that users have read-write permissions to. This confines the users to modifying only reports within this folder as opposed to making changes to reports in other folders which are widely used by others and may contain complex filters you don't want changed. But be sure to train your users on how to create and modify these reports.

### **14. Explain to Users the Importance of Report Filters**

Most reports have some type of default filter on them such as a date range. Administrators will frequently create reports using multiple filters which present only partial data, but may not mention this in the report name or description. Ensure that if you use filters on a report, the user is aware of exactly what the filter means and how that may limit or skew the information in the report they run.

### **15. Create a Group of Report Power Users**

In any large group of Salesforce users, there are some highly technical users who can learn to create advanced and customized reports for themselves as well as teach their counterparts. Training specific users to instruct others in report building helps to keep the reports accurate and clean.

### **16. Limit the Number of Reports in Folder**

Control the number of reports that are in each folder, especially if reports tend to proliferate. Folders containing dozens or hundreds of reports are difficult to navigate. As the number of reports in a folder

grows, create new folders to move certain reports into. Keep reports in each folder confined to a specific topic.

## **17. Purge Old and Unused Reports**

It is fast and easy to create Salesforce reports. But this often results in hundreds of report folders and thousands of reports. Frequently reports are created around specific users who are no longer with the company. Ensure there is a regular process to remove old reports and report folders which have become redundant or out of date, or at the very least, move older reports and report folders to the bottom of the list by numbering the folders. A report on reports should be run at least yearly to identify reports no longer being used.



# **XI. Activity Notation Best Practices**

## **1. Customize the Type of Activity Description**

Activities, tasks and events in Salesforce have a standard field called 'Type'. The default standard values include "email", "call", "meeting", etc. However, 'Type' can be customized and enhanced, yet most clients don't do this.

We have found that more elaborate descriptions of the type of activity can be helpful. For example, is the call (not just a 'call') but an 'introductory outbound cold call', or a 'follow up call', or a 'closing call' or even an 'inbound received call'. The term 'call' alone is just not descriptive enough to define the activity the user has completed.

## **2. Teach Consistent Notation Methods**

Different users will report activities very differently. Some will write long and detailed summaries of the appointment activity...."it was a rainy day...I cautiously approached the front door to the client somewhat nervously, yet confidently....." Other users will be short and straight to the point "... dropped off brochure".

Yet neither of these approaches provide much insight into determining future actions. In our work with thousands of salespeople logging calls and activities in Salesforce we have found that best practices dictate that logged calls or tasks should cover three things; (1) what was discussed, (2) what the next steps should be and, (3) when those steps should be taken.

These three concepts apply whether the logged note is on a sales call or a support case. The goal is not to turn the notation into a diary of unimportant information.

### **3. Don't Use 'Notes and Attachments' Area to Make Call Notes**

In Salesforce, there are several places to record comments on the Account layout. There are two related lists, 'Notes' and 'Notes and Attachments'. The Notes, and Notes and Attachment objects are areas meant to make *general* notes (not activity notes) about an Account record.

Frequently we see salespeople putting ongoing sales activity and task notations in 'Notes' and 'Notes and Attachments'. These areas do not provide a date stamp nor provide for effective reporting, nor will they provide reminders to follow up if a comment to 'follow up in June' is entered there.

Any activity related notation should be entered only by hitting the 'Log a Call' button. And any future activities to take place should be noted by using 'New Task' or 'New Event' buttons only.

#### **4. Don't Use 'Description Fields' to Make Call Notes**

Sometimes a large catch-all custom field will be put on the page layout named 'Description' or 'Next Steps'.

Frequently we see salespeople putting ongoing sales activity and task notations in these text 'Description' boxes. This box will also not provide a date stamp nor provide for effective reporting; nor will it provide a reminder to follow up if a comment to 'follow up in June' is entered there.



# **XII. Expanding Salesforce Use Across the Business**

Salesforce is typically implemented for sales, marketing and support teams. But there are many other departments and individuals across an enterprise who can benefit from the process improvement Salesforce can provide, as well as leverage the data in the system provided by other users.

## **1. Identify Who Uses Spreadsheets and Why**

Almost everyone in a company uses spreadsheets to keep track of something on an ongoing basis. These spreadsheets can typically be replicated by creating a custom object in Salesforce and either used as a stand-alone object or related to other existing objects to provide more functionality.

A simple example we come across frequently is an education department or person keeping track of clients who are attending training events. The 'clients' are almost always existing contacts in Salesforce and by using a spreadsheet, these contacts need to be manually re-entered which is inefficient and leads to possible data entry errors.

Creating a custom object called 'Education Events' and relating the Contact record to it allows for leveraging all the contact records already created. Conversely, the user of the contact records can see the education events a contact attended listed as a related list (if desired) on the contact record.

## **2. Give Sales and Operations Planning Access to Opportunity Forecasts**

Many medium-sized businesses struggle with creating accurate production forecasts. Demand or sales operations planning in many businesses is just an 'educated guess' based on prior year trends or current year hunches.

In the meantime, many salespeople are busily creating sales opportunities with expected close dates. By enhancing the opportunity record to not just track 'estimated close date' but adding fields for 'estimated first production date' and 'estimated shipping date', this information if shared with sales and operations planning can provide dramatic increases in accuracy for production planning.

## **3. Use Salesforce for Business Administration Functions**

Over the years, we have created custom objects for 'Travel Requests', 'Purchase Orders', 'Day Off Requests' and many more daily business processes that companies may be handling in a spreadsheet. We have even linked the standard Salesforce Calendar to keep track of booking conference rooms.

Larger companies may have comprehensive procurement systems that enable these activities, but for medium-sized businesses without

these custom systems, Salesforce can be used to create, route and approve these tasks using standard out-of-the-box functionality.

#### **4. Automate and Streamline Your Proposal Creation**

In many companies, proposals are still created by cutting and pasting documents, and pricing is calculated manually in legacy spreadsheets. Utilizing Salesforce features such as Products & Price Book and the standard Quote functionality will result in dramatic time savings creating proposals. In addition, these Salesforce features provide standardization and reduced risk of pricing errors which occur when multiple copies of spreadsheets float around and are not consistently harmonized and updated.

#### **5. Create a Custom Object to Collect User Feature Requests**

Users of Salesforce inside the business will hear of useful Salesforce ‘Apps’ (custom applications in the Salesforce AppExchange®) as well as come up with new ideas for the internal Salesforce system might be improved, expanded or enhanced. Or they will just want to learn how to do more for themselves in the system such as create their own custom objects, reports and dashboards.

Creating a custom object called ‘Salesforce Requests’ with a tab that lets users create and submit these ideas or requests helps to keep track of them for periodic and consistent review by the company Salesforce leader.

Too many companies just take a “launch it and leave it” approach to their Salesforce system. It is a dynamic system that can be constantly improved, added to and enhanced.



## **XIII. Data Integrity Tips**

### **1. Limit System Administration Level Access**

A Salesforce User with the System Administrator Profile has full system administration level access, giving them the ability to delete all data and configurations. This presents an enormous security risk for companies. There should be no more than one, or two, full System Administrators. If additional users need administrative privileges, Delegated Administrator settings should be used.

### **2. Protect Your Data from Theft by Deactivate Departing Employees Immediately**

Salesforce is a web-based application, not an internally housed application, and companies sometimes forget that although the user may have been deactivated from all internal company systems and networks upon their termination by IT, Salesforce continues to run and be accessible over the web to all active users with a user name and password. Departing employees need to be have their Salesforce access frozen or deactivated immediately.

### **3. Ensure Proper Ownership of Records**

Deactivating a user does not change record ownership. This means that (depending on the organizational settings) all the Lead, Contact, Account, Case and other records that may have been connected to a deactivated user may no longer be visible or accessible by other users.

Ensure that all records have an active user owner and that they do not become invisible.

#### **4. Clean up Old Opportunities, Cases and Leads**

Ensure there is a process for closing or removing old opportunities, cases and leads. Lead buckets often accumulate tens - or hundreds of thousands of unqualified leads which are never converted to Accounts nor removed.

#### **5. Have a Process to Remove Duplicate Records**

Duplicate records wreak havoc on your Salesforce system, yet many companies have no established process nor regular schedule for de-duplicating records. When duplicate records proliferate, users lose trust in the system; notes and opportunities are recorded inside the wrong records, and reports and dashboards become inaccurate. There are many tools for identifying and merging or removing duplicate Leads, Contacts, Accounts and other records.

#### **6. Review Roles, Profiles, Permission Sets and Sharing Settings Regularly**

Your Salesforce system offers many methods of segmenting and partitioning data to ensure only certain users have access to certain records. Access to records can be controlled via Profiles, Permission Sets and Sharing Settings. Many companies leave their Salesforce system unpartitioned, providing internal users with full access to all contact records regardless of their position in the company. Employees will come and go and may take important data with them when they leave. Your Data Protection Impact Assessment should include a review of your Salesforce users and which records and specific data fields on those records each user has access to.