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Admin's guide to maximizing Salesforce ROI

How to employ intelligent automation to close gaps, improve efficiency, and drive better adoption of Salesforce across the enterprise

Why a focus on ROI is key

Most companies don't have an endless supply of cash to burn. So, when they make a considerable investment in new systems and business operations solutions like Salesforce, it's imperative their investment sees a strong return in a reasonable timeframe. Promoting user adoption helps drive this ROI, as creating systems that support commercial operations—and ensuring they are effective for employees—is part of any company's mission.

Salesforce has become indispensable to many successful organizations, but teams often still struggle to leverage it to the fullest extent of its capabilities. Management teams sometimes see Salesforce as a complete solution right out of the box. But for many Salesforce administrators, optimizing the platform for maximum productivity and return on investment (ROI) can be complicated by complex and time-consuming configurations, required user training, and manual processes for managing daily tasks. Specifically, sales and marketing teams routinely wrestle with document generation, records management, and data updates.

They turn to the IT team or the Salesforce administrator for support, resulting in a flood of support requests for sometimes remedial, repetitive tasks. This has the effect of diverting key resources from more strategic initiatives that will help the business grow, better prepare for the future, and better meet its goals.

In response, Salesforce admins and IT support staff need to find new, inventive ways to enable greater self-service and more efficient daily use of systems, processes, and tools. This investment can help keep the business competitive and profitable—without sacrificing more of the admin's and users' valuable time.

Incorporating intelligent automation is one strategic solution for admins looking to make a difference for their organizations—and themselves. It streamlines data management, simplifies customer and operational data updates, and accelerates document creation and delivery for teams across the enterprise. It's an efficient, cost-effective way to maximize productivity, user adoption, and ultimately, return on investment.

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Overcoming siloed tools, large volumes of data, and limited insights

Salesforce is already equipped with an array of essential off-the-shelf features that have become the benchmark for industry standards. Yet, one of the biggest advantages of using Salesforce is its expansive capabilities and extensive ecosystem of active marketplace partners.

The Salesforce AppExchange partners offer a broad range of plugins, APIs, and supporting tools that deliver extra value and capabilities to meet virtually any business need.

However, having so many tools readily available also has its potential downfalls. Specifically, the responsibility of determining which ones to use and how they'll be incorporated into the Salesforce environment falls on individual Salesforce admins, who must figure it out for each team, and sometimes for a whole company, as well.

Each new tool requires customization and configuration to meet the diverse needs of different user groups. And when those processes fall on individuals or to IT teams with limited resources and competing priorities, it can seem an impossible task to deliver the capabilities each team or department requests in a reasonable timeframe.

Effectively managing mountains of data

Beyond configuration and customization, one of the biggest challenges facing Salesforce users and admins is how to handle the massive amounts of viable, useful data created each day. Sales and marketing teams are starved for more information that will help them identify new opportunities and close more business. But much of the information they need will come from sources outside their Salesforce environment.

Consider the B2B purchasing process as an example. The process continues to evolve and now involves an average of seven stakeholders from an array of roles and functions that weren't included in the buying decision previously.[1] And as new buyer roles are added to the mix, sales teams will need to effectively manage increasing volumes of existing customer data and pull in new information from multiple sources to give them every possible edge in securing new opportunities.

Yet the traditional approach to account and records management is already time- and resource-intensive. Manual data entry is tedious and prone to errors. Document creation and distribution usually involve constant toggling among systems, clicking-and-dragging, and copying and pasting. This can result in users wasting up to 66% of daily work time on administration rather than on revenue-generating activities.[2] How can users—or their admins—keep up with these demands to help remain focused on strategic work that creates value for the organization?

There are other negative effects, as well. Over time, wasted effort on low-impact, repetitive tasks will drive sales and marketing users to abandon company-standard processes and develop their own workflows to shortcut the process. Not only does this decrease efficiency, but it increases the likelihood of errors, such as duplicate data, outdated account records, and gaps in information, that can mean the difference between winning a new customer and never knowing it was even an opportunity. In fact, poor data management and quality are already costing US businesses an estimated $3.1 trillion a year due to poor data management and quality.[3]

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The high cost of limited insight and reporting

Of course, ingesting and organizing data is just half of the challenge. Data is only as valuable as the ability to use it to make decisions that move business forward. But because of the limitations of generic analytics tools and out of the box reporting, as little as 5% of data is ever analyzed and mobilized.[4]

Rather than being useful for developing new strategies or aligning sales tactics, the tidal wave of data instead leads to analysis paralysis. The massive volumes of information preclude teams from identifying and prioritizing high-value accounts, segmenting customer accounts for targeted sales and marketing campaigns, or uncovering new business opportunities hiding within the data.

The inability to filter, analyze, and deploy the high-value information residing in Salesforce leads to longer sales cycles, lower average deal sizes, and more pressure on sales teams to perform. In turn, those sales teams end up relying too heavily on IT and admins for the data support they so crucially need, creating inefficiencies and roadblocks that directly impact productivity and profitability for both departments.

In a business environment—where there are chronic challenges with data management, document generation, and meaningful reporting, the resulting undisciplined approach to sales and marketing leads to poor engagement with prospects and customers.

Worse, the hodgepodge of hurried, repetitive emails or calls or other communications can make the organization appear disorganized and out of sync, jeopardizing new business opportunities and ultimately degrading the quality of the customer relationship.

Enhancing Salesforce value and utility with intelligent automation

Salesforce admins and IT teams already have a lot on their plates and face a litany of challenges in trying to optimize Salesforce for multiple user groups or teams.

To simplify support, accelerate deployment of new features and capabilities, and improve overall user adoption, sales and operations leaders can implement third-party productivity tools to extend the value and utility of their Salesforce investment.

Now, organizations can automate the most time-consuming elements of daily Salesforce use and provide every user group with powerful new features for simplifying record and data management. Easy, effective data management creates clean data for analysis, delivering more granular insights for smarter planning and decision-making, and ensuring that the right information is delivered to the right people, at just the right time. And all this can be done without intervention from IT or Salesforce admins.

Visibility

The right tools can provide sales and marketing teams with end-to-end account and opportunity visibility, thanks to consolidated views of multiple levels of data, enabling smarter planning and better decision-making. Consolidating account and contact records makes it easier to sort tasks by priority or due date to ensure that essential activities or communications are never missed.

Additional insights into line-of-business, geographic, and revenue data helps users better allocate their time and efforts toward strategic accounts or those with the highest potential value.

Data governance

Effective solutions can dramatically improve the availability, integrity, and security of Salesforce data, which will support more efficient and effective sales and marketing activities. Data management tools should feature bulk aggregation to easily bring together information from diverse sources. Once in Salesforce, users should be able to update and edit multiple objects simultaneously, edit in-line effortlessly, and batch similar tasks for faster, easier completion. At the same time, data can be safeguarded by only providing access based on permissions or role to ensure security.

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Insights

Knowledge is power, and third-party Salesforce tools can make it easier to access a multitude of company data to analyze for deeper insights and smarter decision-making. Configurable dashboards enable sales reps, managers, marketers, and other users to rapidly generate multi-format reports using the company's proprietary data, then share them with both internal or external audiences. Use cases include forecasting, pipeline analysis, upcoming renewals, and many more.

Data and information delivery

Companies seeking to streamline processes, save time and costs, and boost overall productivity need to make sure that information is reaching the right people at just the right time. Salesforce tools automate previously manual processes. These tools eliminate time spent digging for information or learning new systems for finding it, while also simplifying document generation and distribution, and coordinating reviews and approvals.

Automating document generation and distribution not only saves time and effort, it also eliminates costly errors such as typos, miskeyed dollar figures, and other essential information that are hallmarks of manual processes.

Maximize Salesforce efficiency with the Conga Commercial Operations Suite

Conga's comprehensive Suite of Salesforce automation tools makes sales teams more productive, removes burdens from administrators and IT support staff, and increases organizational efficiency to help deliver a stronger return on the investment.

These flexible, easily configurable tools integrate seamlessly with many enterprise solutions for a seamless user experience and streamlined deployment. Conga's Suite of integrated solutions is purpose-built to maximize the value of your Salesforce deployment by accelerating sales cycles, improving data quality and accuracy, delivering error-free quotes and proposals, and uncovering revenue opportunities that were previously lost to limited business insights.

Here's how:

Conga Grid

Built to address the laborious nature of Salesforce lists, Conga Grid is an intuitive, powerful tool that simplifies data and record management, allowing admins and sales reps to edit information in a familiar spreadsheet-style grid view without having to click through different records and list views.

Salesforce admins can rapidly set parameters and processes based on user roles, enabling text fields and related lists previews from a consolidated reading pane. They can also perform multi-layer filtering and batch edits to enable records editing directly within Salesforce. Implementing a powerful data management solution improves data quality and helps sales teams to uncover opportunities sooner and to engage prospects before competitors—without additional help or support from the administrator or IT.

Conga Composer

This document generation solution allows sales teams to efficiently create and deliver key communications like proposals, quotes, and invoices with a single click. Conga Composer eliminates manual copy-paste work and dramatically accelerates sales cycles with customizable templates that result in perfectly formatted, on-brand documents.

Merge data in Salesforce from internal and external data sources and deliver quotes, proposals, and other key documents in Word, Excel, PowerPoint, PDF or HTML email formats with a single click. Composer helps sales teams address sales opportunities faster and respond instantly to customer demands with 95% more efficient document generation that eliminates unproductive time and frees sales teams to pursue revenue-generating activities.

Conga CLM

Accelerate negotiations so you can close deals faster—without leaving Salesforce. Conga CLM streamlines contract lifecycle management to improve productivity with predefined templates, a pre-approved clause library, and sophisticated redlining, version review, and data True-Up tools.

Conga solutions feature enhanced tools to accelerate negotiation and approvals by eliminating bottlenecks, centralizing contract creation, and securely storing contract versions and final documents back in a central repository. Central access to contracts and the ability to search them allows legal teams to do granular reporting on contract data and navigate complex agreements faster and more securely for greater transparency.

76% of global Salesforce users increased their investments in analytics during the last 12 months and were three times more likely to see data quality as a competitive advantage.[5]

Simplified processes, efficient workflows, and greater ROI

CRM platforms like Salesforce are a major investment, requiring valuable time and resources. Too often manual processes, inefficient workflows, and evolving business needs make it difficult to achieve maximum return and value from the investment.

Using automation tools and applications can help simplify complex and time-consuming data management tasks, while also streamlining other parts of the sales cycle to save time, money, and to spare admins and IT teams the stress of managing wide-ranging and repetitive support requests.

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1 Toman, Nicholas; et al. "The New Sales Imperative." Harvard Business Review. March 2017.

2 Green, Lucy. "Why Businesses Waste 66% of Their Sales People's Time." LinkedIn. August 28, 2014.

3 "The Four V's of Big Data." IBM Big Data & Analytics Hub. http://www. ibmbigdatahub.com/

4 "Hidden Costs of Data Mismanagement." National Instruments. December 6, 2016.

5 "The 2016-2017 Annual Report: The State of Salesforce." Survey conducted Q2 and Q3 of 2016. Bluewolf, an IBM company.

Learn more about how Conga solutions can help your organization work more efficiently, more intelligently, and deliver a stronger ROI on your Salesforce investment.

About Conga

Conga, the global leader in commercial operations transformation, helps businesses simplify and automate their approach to the essential quotes, contracts, and documents that drive commerce. We help our customers become more agile, so they can adapt quickly to change and create a fluid, connected customer experience. Companies choose Conga for the most comprehensive solution set in the market and expert guidance, enabling them to transform the processes and documents surrounding customer engagement, configure price quote (CPQ), contract lifecycle management (CLM), and the complete commercial operations lifecycle. With Conga, businesses evolve their commercial operations to streamline their revenue processes and derive the meaningful insights that lead to sustained growth.

Conga is headquartered in San Mateo, California with global operations across North America, Europe, and Asia.

Learn more at **conga.com** or follow Conga on Twitter: **@CongaHQ**

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