STREAMLINE YOUR LEAD TO CASH PROCESS WITH SALESFORCE

MARKETING → SALES → PRICING & QUOTING → ORDER MANAGEMENT → CUSTOMER SERVICE → REVENUE MANAGEMENT

THE ULTIMATE END-TO-END PROCESS FLOW FOR YOUR CUSTOMER ENGAGEMENT LIFECYCLE

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INTRODUCTION

Today, many organizations are wanting an "all-in-one" solution when it comes to their business applications. When tech stacks do not integrate across internal departments, data silos are created which leads to process inefficiencies across the customer engagement lifecycle and potential loss of revenue. **Lead-to-cash is an end-to-end, high-level business process that starts with marketing and includes sales process management, price and quoting, order management, customer service, and concludes with revenue collection.**

Lead-to-cash is one of the most critical business processes for any organization as it provides a 360-degree view of their customers from marketing messaging, sales opportunities, orders, payments, and more. This process determines the customer's experience when interacting with the company. SAP defines lead-to cash as, "Management of all aspects of an initial contact with an unknown customer to order fulfillment and service delivery allowing you to turn prospects into lifetime customers."

For many organizations, this crucial process is overly manual, full of bottlenecks, and often generates bad data which leads to several challenges. For instance:

- Sales losing visibility into marketing qualified leads
- Pricing group manually generating quotes out of excel and then running them by finance
- Poor visibility into future revenue
- Slow handoff between sales and finance

Salesforce offers end-to-end solutions for these 6 sub-processes to be executed efficiently across the customer engagement lifecycle. Additionally, it enables a frictionless process by providing the tools required to integrate Salesforce with other enterprise systems that are strategic to the lead-to-cash process. Let's review a few solutions Salesforce has to offer across each of the 6 sub-processes.

Optimizing your enterprise systems and business processes is a critical step to increasing productivity and profitability. Salesforce offers solutions to create an efficient, streamline lead to cash process with features to support each sub-process.

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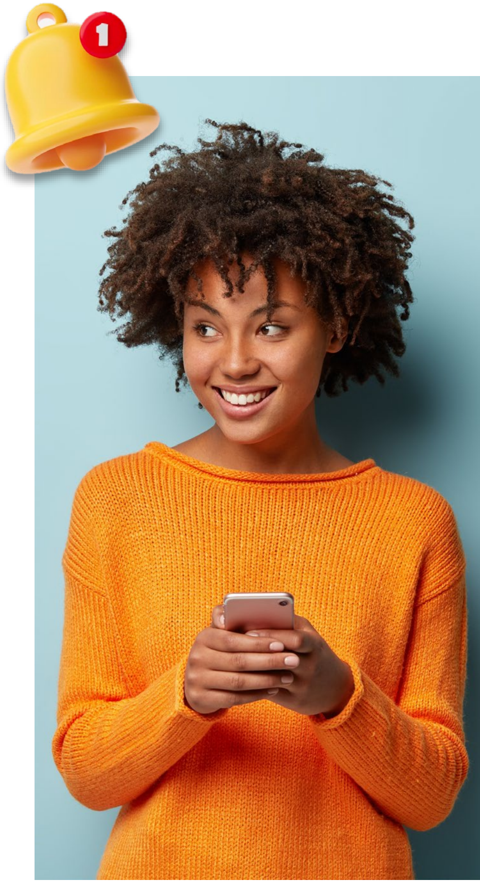
MARKETING

MARKETING

There is no denying that today's marketers need to be more proactive and strategic to enhance customer retention and satisfaction. Successful marketers not only understand the customers' needs but also take the initiative to deliver exceptional and superior customer experiences consistent with consumer behavior. Leveraging robust and invaluable tools are often highly beneficial for driving customer experience and business growth.

[Salesforce Marketing Cloud]serves customers in multiple ways such as **analyzing their behavioral history to predict future actions and responses.** A customer's history of past actions can help marketers predict their future actions, such as:

- A customer's tendency to abandon their online shopping cart
- How they share product details with friends
- When they are more likely to buy the product



Based on these data insights, marketers can easily drive personalized customer experience and stimulate positive business impact. For instance, an outsized majority of consumers tend to get items on sale. Businesses can reduce the burden of inventory management by sending notifications to the audience when a sale is announced. Marketers can even **improve and increase customer satisfaction consistent with their preferences, engage new customers towards products, and benefit the business with higher customer response rates.**

DELIVER EFFECTIVE COMMUNICATION

Effective marketing communication is often difficult in today's digital age. Customers are often bombarded with an overwhelming amount of promotional emails which they tend to delete without even opening them. In other words, marketers need to create and deliver personalized content catered to customers' interests.

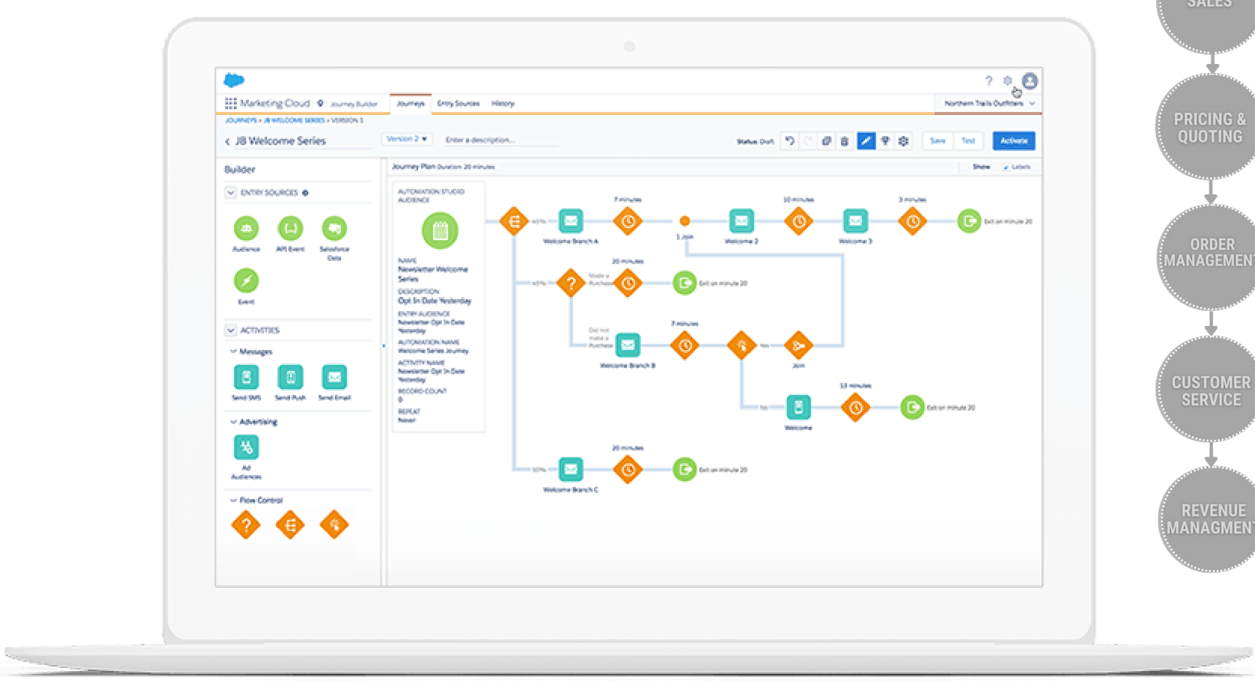
Salesforce Marketing Cloud crafts concise and consistent messages to help marketers send personalized and relevant messages to their audiences. It also provides the benefit of tracking the level of satisfaction that the customer enjoys with product delivery.

The drag-and-drop content feature of Salesforce Marketing Cloud makes it easy for marketers to craft engaging emails.

With dynamic content blocks, automated predictive decisions, and predefined event triggers, marketers can automatically send relevant messages at any time during the customer journey.

Marketing Cloud **focuses on one-to-one customer journeys through all connected devices on every channel.** Businesses can connect and interact with their customers from anywhere, combining customer data and behaviors to create relevant and effective real-time communications.

In a nutshell, Salesforce Marketing Cloud is the ideal platform for delivering relevant, personalized journeys across the proper messaging channels and devices.



ADDITIONAL TIPS & RESOURCES

TIP 1: DATA EXTENSIONS

If you have multiple data extensions that need to be created, create them at the root level (Main Data Extension Folder) and then move them all at once to the desired target folder. This will save time because you don't have to navigate the file path each time a new one is created. You can move all at once.

TIP 2: POST-PURCHASE MESSAGING

Automate your post-purchase messages. Set up a re-engagement campaign for a week, a month, and 90 days post-purchase. Determine the point when subscribers typically purchase from your brand again (or disengage) and start from there to further personalize the send dates.

RESOURCE: HUBSPOT INTEGRATION CASE STUDY

For consistent messaging and lead hand off between Marketing and Sales departments, see how Smartbridge deployed a HubSpot integration with Salesforce to synchronize lead management to improve our client's relationship with their customers and providers

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SALES PROCESS

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SALES PROCESS

UNDERSTANDING YOUR CUSTOMERS' PROSPECTS

How can you sell to and retain customers if you do not understand their needs, key contacts, and what account activities and transactions have taken place? Can you serve your customers well if you are not familiar with how your products and services help improve your customer's customer's (no, that is not a typo) experience? With Sales Cloud, you can track all your important client data in one place so that you can develop solutions that deliver real value to your customers, which in turn should mean higher satisfaction with their customers.

CENTRALIZING CLIENT INFORMATION

Have you ever wasted time tracking down a customer contact or an address that you simply know exists within the walls of your company? What about trying to seek out which sales rep owns the connection with a subsidiary of a worldwide client? With Sales Cloud, you can quickly centralize and organize your accounts and contacts so that you can capitalize on that information when you need to.

DATA DRIVEN SALES CULTURE

Sales Cloud Einstein is an intelligence solution that accelerates decision making and productivity. Lead and opportunity scoring help you predict which leads/opportunities are most likely to convert. Activity capture and automated contacts help you automate your mundane tasks so that Sales team can spend more time selling

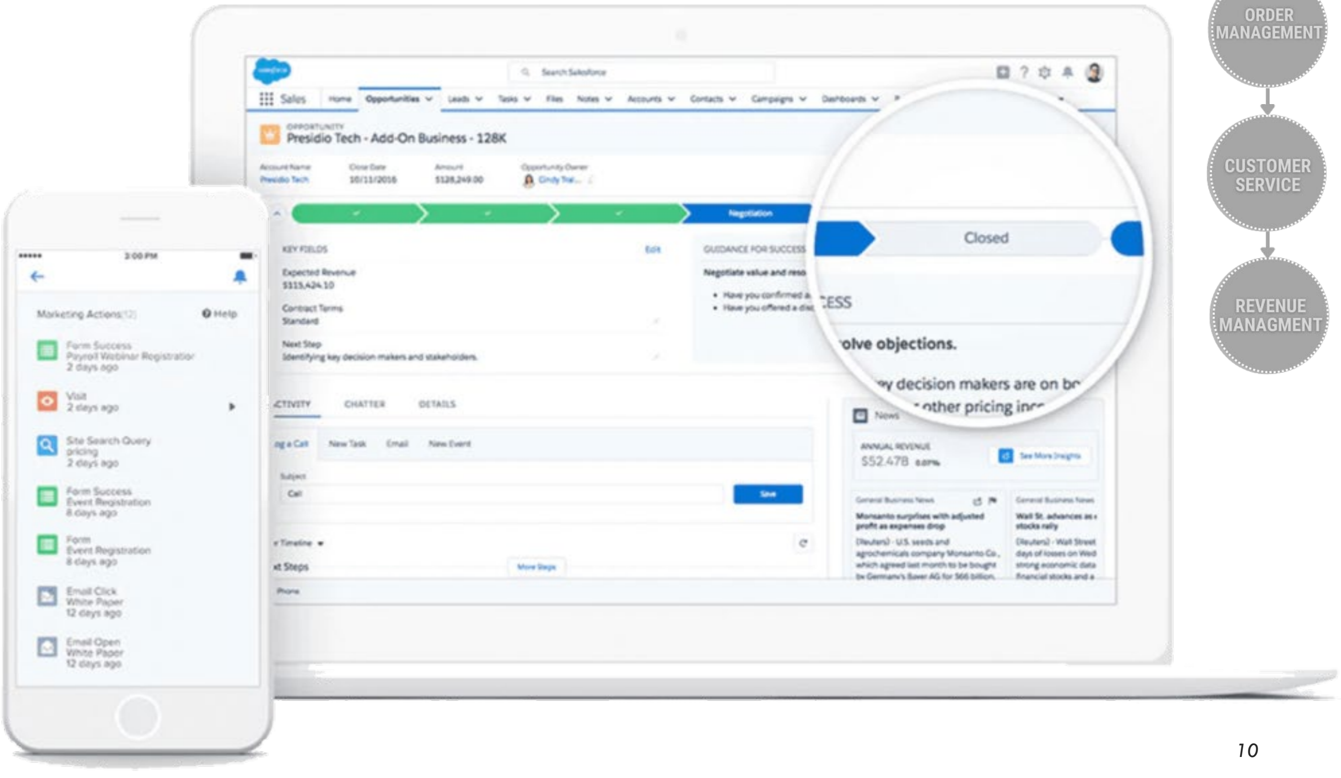
EXPANDING THE FUNNEL

Inputs and outputs, right? The more leads you generate and pursue, the greater chance that your revenue will grow. So, the big question is, “How do I make the machine work?” With Sales Cloud, you can plan, manage, measure, and improve lead generation, qualification, and conversion. You can see what portion of business you or your team generates, the sources of that business, and who in your team is making it happen.

ANYWHERE ACCESS

The mobile revolution that hit your personal life is now a large part of business life, too. People work from home or on the road, oftentimes due to the new universe of cloud-based business programs that have evolved within the last decade. Globalization means that offices are oftentimes spread out, so you expect to be able to access information from multiple devices, easily and reliably.

With Salesforce, you can **access and manage your critical customer information anytime, online or offline**, in multiple languages, and from multiple devices.

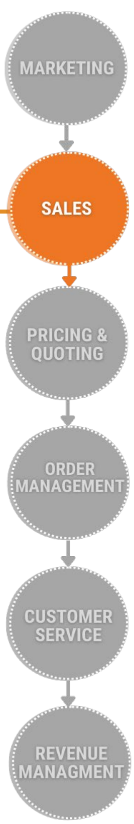


MEASURING BUSINESS

How can you improve what you cannot measure? If you employ Salesforce correctly and frequently to manage customers, you'll have data to create informed decisions. This can benefit everyone in the company.

If you are a rep, you know what you need to do to get the rewards you want. If you are a manager, you can pinpoint where to get involved to drive your numbers. **Salesforce's reporting and dashboards give you easy-to-use tools** to measure and analyze your business.

ADDITIONAL TIPS & RESOURCES



TIP: SALESFORCE & POWER BI

Salesforce is more than just a CRM system. If you unleash the full potential of the Salesforce application platform, you can use it to build many solutions without a need for complex custom development. Here is an example of how Salesforce can creatively be used to manage workplace reopening after COVID.

RESOURCE: SALESFORCE IMPLEMETNATION CASE STUDY

See how Smartbridge helped a Global Medical Device manufacturer implement Salesforce in the US and successfully transition other business units transition from Salesforce Classic to Lightning.

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PRICING, QUOTING, & ORDER MANAGEMENT

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SALESFORCE CPQ & ORDER MANAGEMENT

Today, the lead to cash process has become intensely competitive and sophisticated across a good range of industries and organizations. Manual processes are quickly becoming outgrown, outdated, and difficult to take care of. On top of this, you have thousands of competitors who are also vying for the business of your potential customers. If your competitors are making quick and impressive quotes while your sales reps follow a cumbersome process to configure a quote, you will lose customers.

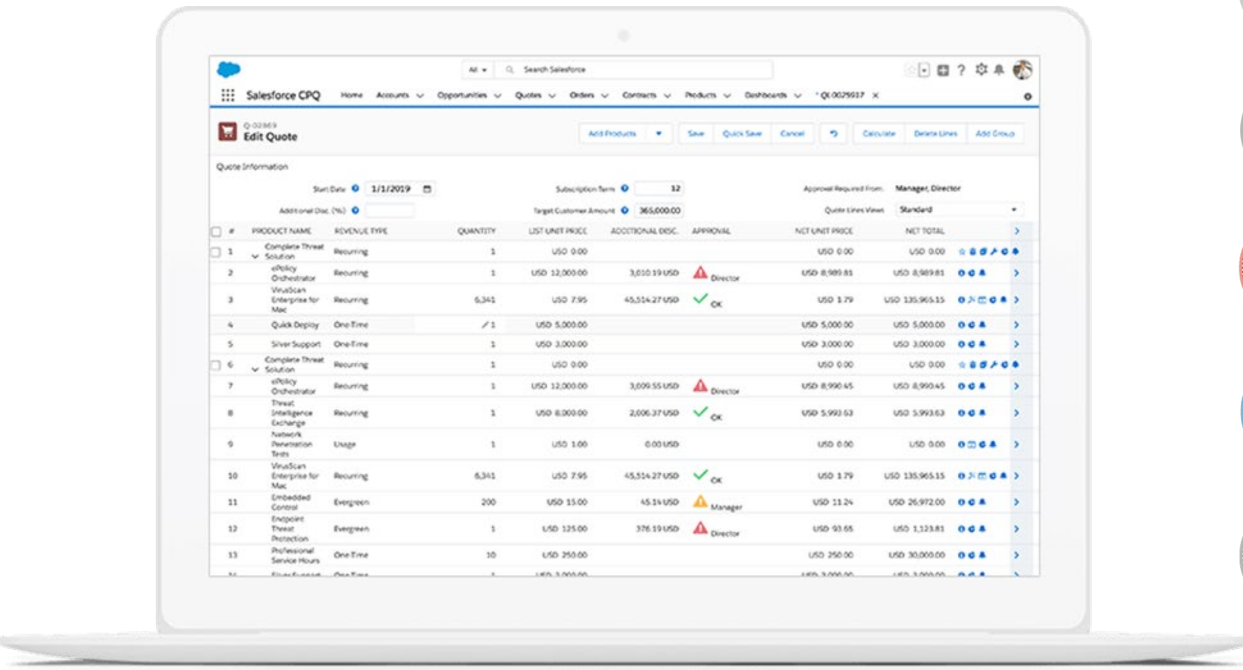
One of the best tools you can invest in to alleviate this is the Salesforce CPQ (Configure, Price, Quote) application. Salesforce CPQ acts as a guardrail to your sales process, helping your team quickly provide accurate pricing across a variety of scenarios. It facilitates your quoting process from the first interaction with a client right up to the final calculations — and it does not end there, thanks to streamlined review and follow-up capabilities.

CREATE QUOTES EFFICIENTLY & EASILY

The otherwise-complicated process of quote management becomes an integral part of your sales process by integrating the answer with your customer relationship management (CRM) process. You can easily add discounts, pick and choose products, and prices, and get automatic updates of all functionalities and amounts without even leaving your CRM system. The best thing is that you can create alternative quotes and even update or edit the proposals created by you throughout the sales process until you have reached the desired outcome.

DELIVER PROFESSIONAL AND ACCURATE QUOTES THE FIRST TIME

The business proposals created by your sales team influence – directly and heavily – how customers perceive your brand. However, it is tough for every rep to get proposals within the same format. That's where Salesforce CPQ comes in. It can help you standardize the sales proposals and give you complete, uninterrupted access to the looks and content of the proposals. This, in turn, helps your reps make professional and cohesive impressions before customers.



MAINTAIN ACCURATE INFORMATION

Keeping your organization's information up to date can be difficult, especially if you are restructuring or have many systems to keep track of across the company. If you are using spreadsheets and docs to manage your terms and conditions, tariffs, and other important information, there is a high chance that older versions of those documents are being circulated and employed by both team members and clients.

Salesforce and linked cloud-based applications like CPQ can help centralize and maintain data. CPQ also acts as your company's universal access point for that data. This ensures that each team member has access to the most current documents and knowledge.

EXCESSIVE DISCOUNTING

Discounts are often an efficient way to motivate and reward customers that use and bundle your products — but when too many purchasers are given overly generous markdowns or inaccurate discounts, your profits take a hit.

Excessive discounting is common when a sales team does not have an automated system to perform calculations based on the customer's profile, or when they do not have enforced rules in place to cap discounts.

Using CPQ to set limits on your discount policy and to require different degrees of approval for discounts helps ensure your customers can get a fair price while your company continues to generate revenue.

ADDITIONAL TIP

TIP : SALESFORCE CPQ PLUGINS

Tip: Try using Salesforce CPQ plugins that **offer enhanced functionality** over what is already included with Salesforce CPQ to make life easier.

For example, Use **the Product Search plugin** to modify or add specificity to product filter searches and guided selling searches. Use the **Javascript Quote Calculator plugin** to add extra functionality to the quote line editor in Salesforce CPQ with custom JavaScript code. There are seven available methods that allow you to change how calculations are performed and manage page-level security such as field visibility.

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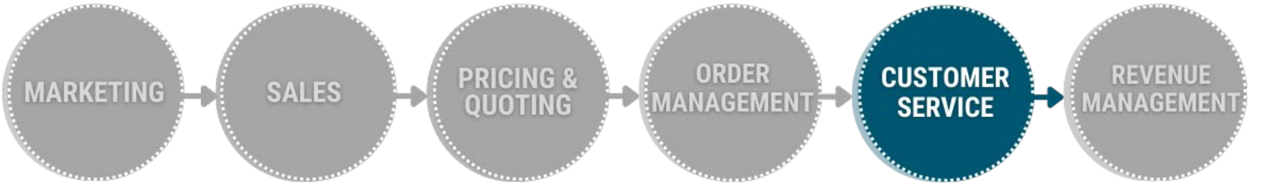
CUSTOMER SERVICE

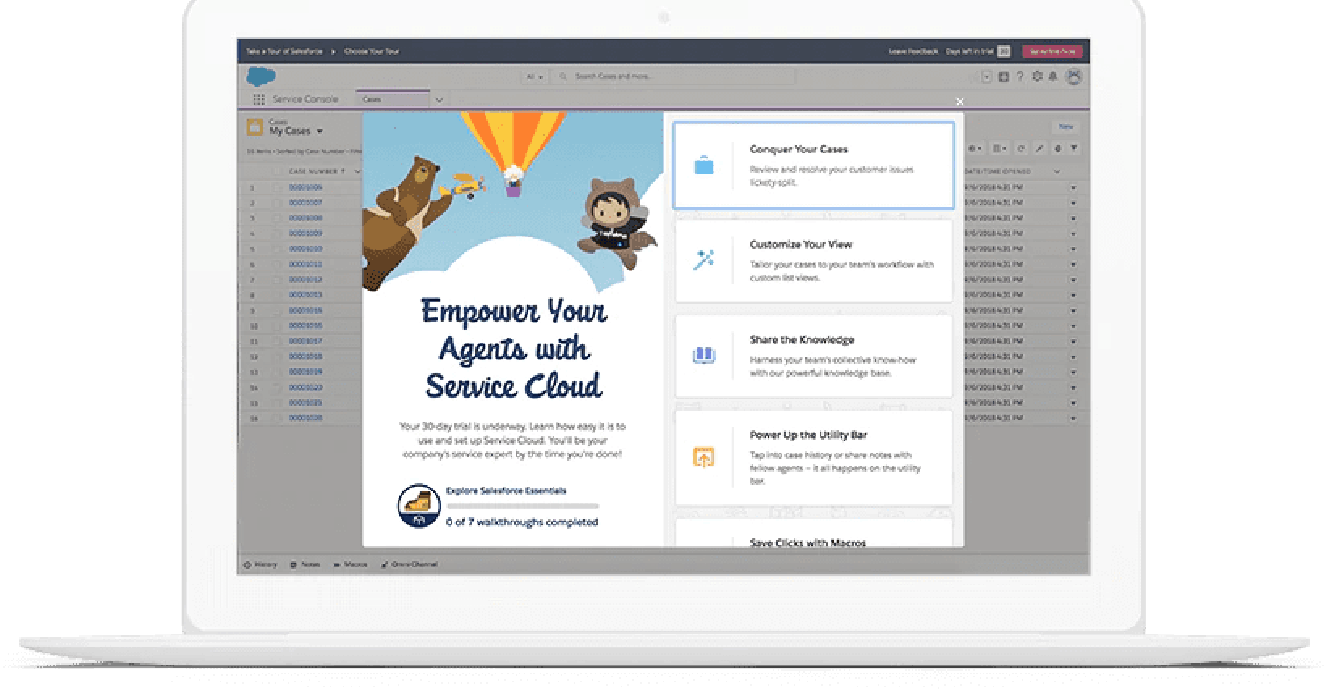


CUSTOMER SERVICE

In many cases, support specialists fail to deliver and help a client due to not having the proper tools. When there is a struggle in collecting or allocating the needed data, it can cause frustration and wasted time on untangling puzzles of data. This is especially common when serving multiple customers at the same time. Generally, clients don't want to wait, therefore, adapting to the fast-paced environment and providing the service within appropriate time frames will allow you to create trust and reduce the probability of client dissatisfaction.

The Salesforce Service Cloud provides flexible solutions to solve such problems by using an organized Agent Workspace including a comprehensive console and case management.

The Agent Workspace within Lightning Service Console features a handy layout that can be personalized with several panels displaying all the key data in a structured way. Cases, accounts, orders, and anything that is needed for speeding up work are visible within the workspace. The console also provides ultimate navigation. All of this provides convenience and saves time when managing cases, browsing customer history, dashboards, etc. Plus, the workspace is customizable so you can pull out any needed sections and tools for faster access.



Cases are for logging, organizing, and resolving customer queries. Cases have customizable fields, can vary by type, and can even be auto-created on a web-to-case or email-to-case basis. The case management feature also includes convenient case assignments which can be done manually or by formula and provides case escalation from team to team or a manager.

ACHIEVE FASTER RESOLUTION TIMES

Having unbalanced workloads is an issue that often occurs among client service teams. As a rule, tons of hours are spent performing repetitive actions manually when helping a client which, of course, slows down the case resolution process.

Salesforce Service Cloud offers many tools and integrations to automate manual tasks. Service Cloud allows you to automate processes such as field updates, fixing reminder notifications, or creating send-outs with email templates. Furthermore, Service Process Automation is designed to assist you in customizing automated processes specifically for your team. Using drag-and-drop functionality, you can make a path for your specialist which will show how a case should be handled step by step.

Another service process automation feature is that, with additional setup, a live agent can integrate a talk service that can provide customers online help in real-time. The AI chatbot learns from previous replies and provides personal service.
Telephony Integration makes it simple to receive and make calls right from Salesforce. The system automatically logs calls, documenting every detail of the activity history and other related objects.

DEVELOP SPECIALIZED KNOWLEDGE

There are many cases when a specialist lacks the necessary knowledge or expertise for answering a customer’s question. In order to not be caught off guard and to avoid vague answers which may ruin the general customer experience, Service Cloud offers Knowledge Management and Omni-Channel Routing features. The knowledge domain tool was created for specialists to collect the simplest practice articles and Q&A solutions for others to reuse.

By having fast access to the context knowledge domain with ready-made solutions that are provided to help a Support Specialist in handling the case, it becomes much easier to reply to clients correctly, quickly, and to resolve cases. Omni-Channel Routing directs cases to specific specialists not only based on availability and workload but more importantly on their qualifications and skillsets.

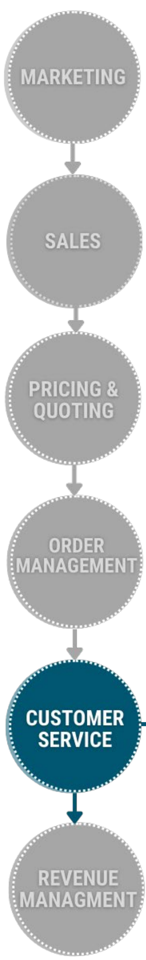
EFFECTIVE DATA MONITORING & PROCESSING

At times, managers encounter the problem of evaluating the performance of their team, work capacity, and other metrics in handling customers. Service Cloud Service Analytics provides comprehensive reports and dashboards which make it easy to watch and keep track of knowledge, like the number of incoming calls, processed requests, and created/resolved cases.

The reports can provide a clear understanding of the work volumes, help to see the progress of teams and individual employees, and make it possible to ascertain the case trends and benchmarks. On top of that, you can build and configure the reports quickly by customizing what you would like to see. Therefore, even your support agent can make use of this data solution to help make the right decisions.

ENABLE CUSTOMER SELF SERVICE

The best support ticket is the one that is never created. Enabling customers with self-service options to resolve simple issues by themselves instead of reaching out to a customer service rep will significantly improve overall customer experience. Salesforce Experience Cloud allows companies to build branded portals and communities. Customers can collaborate with each other to research solutions, resolve issues or login to branded portals that allow them to perform basic functions such as Order Inquiry, Account updates or Invoice payments. Experience cloud's out-of-the-box integration with Service Cloud provides seamless self-service that also gives customer service agents a 360-degree customer view.



ADDITIONAL TIPS

TIP #1 : CASE ASSIGNMENTS

Utilize the Case automation tools like case assignments to assign cases to the right person the first time rather than having a case go from person to person before getting the problem solved. Set up escalation rules for cases that have been in the queue for a certain amount of time to be provided immediate attention.

TIP #2 : MACROS

Automate manual tasks with Macros. By setting up Macros, you can save your agents time on doing repetitive, manual tasks such as sending an email or making a field update.

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REVENUE MANAGEMENT:
INTEGRATION & REPORTING

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REVENUE MANAGEMENT:
INTEGRATION & REPORTING

Several mid to large organizations prefer to use an ERP system to track and manage their financials. With sales and finance using two separate systems for CRM and accounting needs, a disconnect between those two departments tend to occur. Manual solutions to reconcile and report data from two data sources can be error-prone and inefficient.

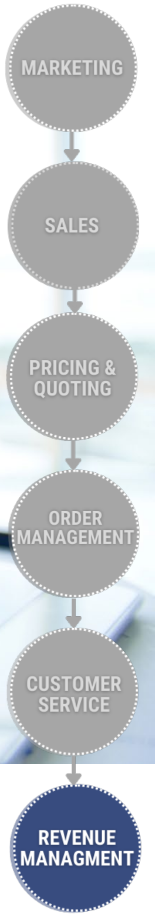
Salesforce offers a robust API layer that makes real-time or asynchronous integrations feasible. However, custom integration projects can quickly become complex and redundant if they are not strategically architected. Salesforce offers a MuleSoft Anypoint platform that allows you to develop APIs and integrations very quickly. MuleSoft has the toolset and assets needed to build integrations with clicks or code whether through the web interface or desktop IDE.

Once created, developers have many choices to deploy their integrations. Mule has a lightweight runtime that supports integrations to be deployed on-premise, on the cloud, or in a hybrid environment. MuleSoft promises a 99.9% uptime if you decide to use MuleSoft's CloudHub to deploy on the cloud.

Finding answers to critical business questions and making good decisions is significant to executives and their companies' success and competitive position. All the systems and sub-processes within the lead to cash process produce vital data that can help you find those answers. It is important to produce intuitive, easy-to-use reports and dashboards that show how you performed within the past and what is happening now.

Salesforce offers a powerful suite of reporting tools that work together to help you understand and act on your data. Leverage standard Salesforce reports to quickly build simple reports to quickly answer common questions. For example, questions like “which products are my top sellers?” and “who are my highest value prospects?” can be easily answered by building simple reports. Dashboards allow you to provide several insights by offering a visual display of all several key metrics across multiple data sets together in one place.

Sometimes basic reports that simply state facts may not be sufficient. Sales reps can benefit from deep analytics that can spot opportunities, predict outcomes and offer recommendations. Tableau CRM (previously called Einstein Analytics) is an advanced analytics solution with built-in AI capabilities. It allows you to build analytics reports with clicks and makes analytics available natively within Salesforce CRM.



ADDITIONAL TIPS

TIP #1 : FIELD FORMULAS

If a calculated field is needed in a report, before creating a new formula field to the object, try to see if a “row-level” or “summary level” formula can take care of your needs.

TIP #2 : CHANGE DATA CAPTURE

See how Salesforce’s Change Data Capture (CDC) can be leveraged to achieve real-time integration with Salesforce

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Since 2003, Smartbridge has applied thought leadership and innovation to modernize business systems. Smartbridge's Salesforce certified consultants are backed by decades of experience implementing and maintaining core enterprise systems.

With our deep expertise in Salesforce integrations and custom application developments, Smartbridge is uniquely positioned to assist organizations with complex CRM implementations.

Contact Smartbridge to discuss your path with Salesforce. We'll provide specific recommendations based on your needs.

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