5 STEPS

TO GET MORE VALUE FROM SALESFORCE

salesforce success cloud

INTRODUCTION

The better your Salesforce org is running, the more value you'll get from it. But your user base is diverse and their needs are constantly evolving. So how do you identify those evolving needs and adapt your org to serve them smoothly and efficiently? In this e-book, we'll be covering 5 steps you can take to assess and optimize your org and ensure it is in peak "health" now and in the future.

Regular Salesforce org health checkups allow you to:

- Prioritize efforts to remove unneeded customizations and complexity
- Refine processes, layouts, and automation to match your day-to-day needs
- Innovate with the latest Salesforce features or products

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STEP #1

START WITH YOUR PEOPLE

To understand the current state of your Salesforce org, you need to start with your users. You need to discover how people are using your system day to day, what's working for them, what's not working for them, and what you can do to support their improved productivity and job satisfaction.

That means getting honest insights from them. So we're going to talk about four tried-and-true ways to accomplish that: user ride-alongs, user shadowing, user surveys, and whiteboarding. Putting one or more of these methods to work will provide significant benefits, including:

- Improving work processes for your users, so they can be more successful
- Building decision-maker support for your business case based on credible insights
- Knowing where to set your priorities, based on what will have the fastest impact

User Ride-Alongs

One of the most direct ways to discover how people use your Salesforce org and understand the challenges they face day to day is to literally "ride along with them" as they perform their daily job functions in the field.

For example, ride with your sales reps as they visit their sales territories, attend customer appointments, take sales calls, and set up product deliveries. This is a powerful way to discover your users' actual experience, giving you insight into how you can improve that experience with more strategic system design. You'll likely find ways to cut out time-consuming data entry steps, streamline order taking, and more.

User Shadowing

User shadowing is similar to a ride-along. However, it takes place in the office, and as you follow a user through their daily routine, you'll be exposed to more of your user base over a shorter time. The result? You'll likely gather more substantially validated insights about what's running smoothly and what's not. That is to say, it's easy to see what needs to be fixed, enhanced or simplified, if you're surrounded by people who are bogged down by duplicate data entries, complaining about slow-loading pages or dealing with too many clicks.

Anonymous User Surveys

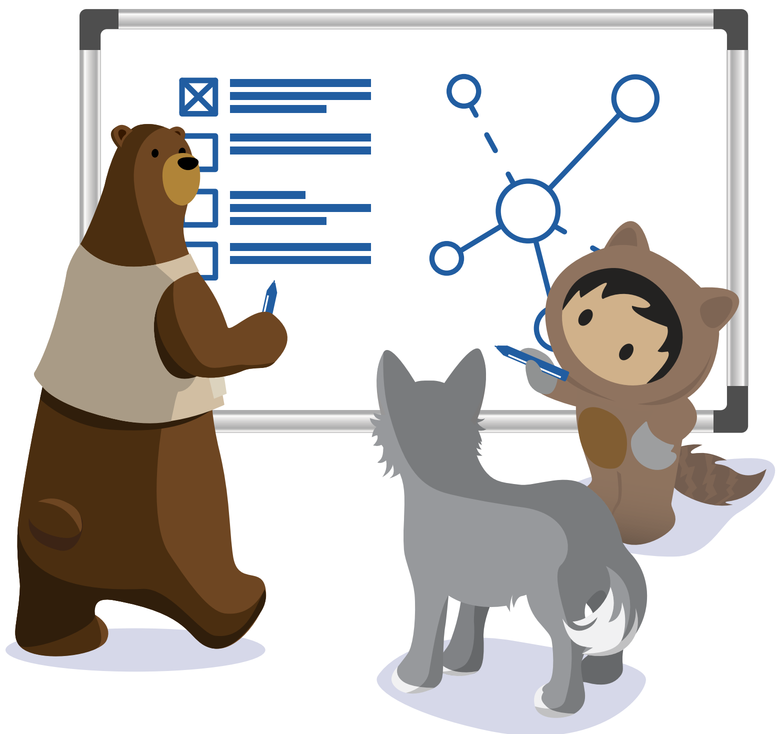
Anonymous user surveys are a great way to gather valuable feedback on your Salesforce org, because they make it easy for users to give honest, unfiltered feedback about what they like and don't like. And having written responses to reference is a valuable tool when it comes time to secure buy-in from stakeholders, for the updates and edits you're proposing.

When you prepare user surveys, include open-ended questions, rather than yes or no questions. This will ensure deeper insights and help you define actionable steps to improve your users' experience.

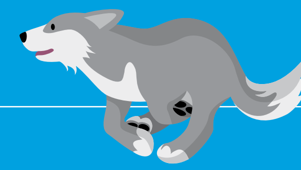
Whiteboarding

Gathering a group of users and putting their thoughts and observations up on a whiteboard is a tried-and-true approach to gathering insights – and its unique strength is the collaborative environment it creates. It may be the best way to capture a collective perspective on where improvements are needed in your Salesforce org.

In addition, whiteboarding exercises are a great way to make your users a part of the process, as you record their opinions in real time. This gives them a sense of ownership in the changes you make, and encourages adoption where necessary.



SUCCESS TIP



When whiteboarding, we recommend using the "swim lanes" methodology and incorporating digital flowcharting:

- **Swim lanes:** This is a visual exercise that shows which users are doing what, and where jobs overlap (i.e., where people cross into each other's swim lanes). This will provide tremendous insight into how different parties are interacting with your org.
- **Digital flowcharting:** Tools like Visio or Lucidchart give you the ability to convert your whiteboard insights into digital flowcharts to share with your team. It's a great way to carry the benefit of a whiteboarding session beyond the meeting.

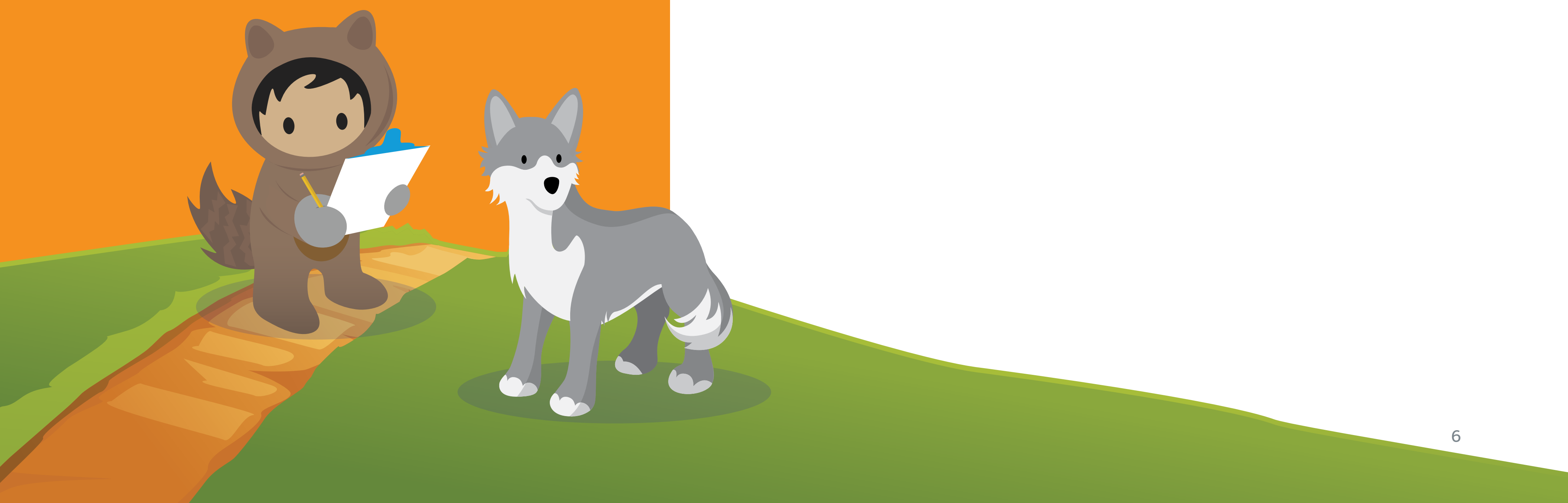
STEP #2

SURVEY YOUR TECHNOLOGY

After you've gathered insights from your people, the next step is evaluating your Salesforce org technology. There was a time when this was a tedious, time-consuming process, dubbed "systems spelunking." But Salesforce has invested a great deal in developing an array of innovative tools to transform the process and help you improve your system faster.

Run Salesforce Optimizer

Salesforce Optimizer is an in-app tool that automates the analysis of your org, giving you the insight you need to improve performance. It determines how your company uses Salesforce features, then identifies ways you can improve everything from your maintenance, to your productivity, to your adoption – for greater performance, speed, and efficiency. Optimizer takes the guesswork out of understanding exactly what you need to do to maintain and improve your system, providing a report to guide your efforts.

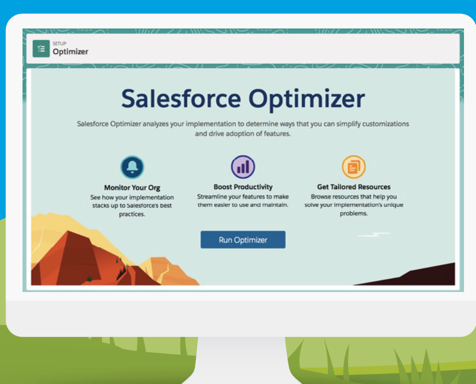


SUCCESS TIP

Salesforce Optimizer features:

- Delivers detailed insights into your metrics and tools
- Provides recommendations on how to manage your org with greater precision and productivity
- Runs in both sandbox and production environments
- Updated semimonthly, with new features
- Offers links to tools and resources

Salesforce Optimizer is available to all Professional, Enterprise, Performance, Unlimited, and Developer Editions. To learn more, visit this community page.



Want expert guidance to improve Org Health?

Salesforce Accelerators* are one-on-one, specialized engagements designed to address any issues you are facing – and the Org Health Assessment Accelerator is a great tool to guide your org health efforts.

This Accelerator is a two to four week engagement, led by a Salesforce Specialist, culminating in a complete analysis of your org, which will be invaluable in informing the changes you need to make to reach the next level of productivity and success.

** Accelerators are available to all Premier, Premier Plus, and Signature customers.*

STEP #3

SIMPLIFY THE USER EXPERIENCE

Once you've evaluated your people and your technology, you'll likely identify recurring issues. Maybe you're seeing that there are too many fields. Maybe you're seeing that the pages are too long or take too long to load. Maybe people are having to navigate too much. These are all symptoms that it's time to optimize your operation. There are four ways to achieve this goal: creating validation rules, pre-populating activity fields, deleting unnecessary fields, and configuring Lightning Sales Path.

Create Validation Rules

Validation rules verify that the data users enter into records meets the standards you specify before they can save the record, thereby, preventing bad data entry. You can create validation rules for objects, fields, campaign members, or case milestones. For example, you can ensure that all phone number fields contain a specified format or that discounts applied to certain products never exceed a defined percentage.

The goal with validation rules should be to strike the right balance – not too many and not too few. As a rule of thumb, "when in doubt, leave it out." Begin with a few that you believe are necessary, collect feedback, make iterative updates, and build from there. It's easier to add new enhancements than to take them out after the fact. For more tips on using validation rules, check out this Trailhead module.

Pre-populate Fields with Custom Actions

When you create actions, it's best to use as few fields as possible. Most users, especially mobile users, prefer fewer fields. To reduce data entry, you can use "predefined field values," which are workflow rules that pre-populate fields with custom actions. Predefined values can make it faster and easier for users to create records and ensure consistency.

The more fields you're able to assign predefined values, the more you can remove from the layout, making actions easier and quicker. The goal is obviously to balance ease of use with the need for required information. Want to get some more tips on using predefined values? [This Trailhead module] can help.

Delete Unneeded Fields and Shorten Page Layouts

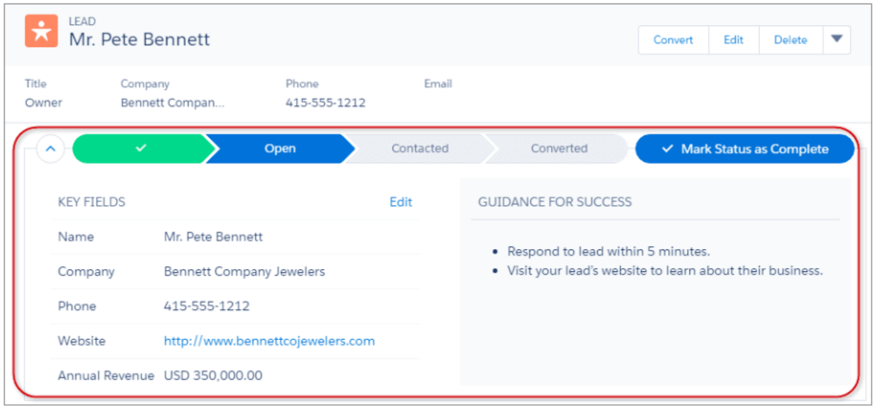
One thing your user research may reveal is that many standard fields can be deleted entirely. This will shorten your page layouts, simplify user views, and streamline the workflow.

Back up your data before deleting custom fields from Salesforce, because all data in the fields will be lost when the field is deleted. Also, keep in mind that the only fields that cannot be removed are Salesforce standard fields, because they are universally required. (These fields are displayed in bold, with a blue circle icon.) To learn more about optimizing your page layouts, see this Trailhead module.

Configure Lightning Sales Path

Lightning Sales Path* is a visual representation of your unique sales process. It guides your users through each stage of your sales process, so they can stay focused on the steps required to qualify leads and close opportunities. It also improves data accuracy.

Configuring Sales Path is easy. Work with your sales operations manager to determine your sales stages and develop the guidance users need to be successful. To learn more about customizing a sales path for your team, see this Trailhead module.



** Available in Lightning Experience only.*

STEP #4

MAXIMIZE YOUR SYSTEM'S PERFORMANCE & FUNCTIONALITY

With 700 new features and counting, Lightning is quite simply the next level of CRM. End users get more productivity straight out of the box, and admins and developers can customize and build new features faster. Plus, Lightning's seamless integration with AppExchange makes it easier than ever to implement game-changing new apps.

Of course, the numbers say it best:

41% more productivity

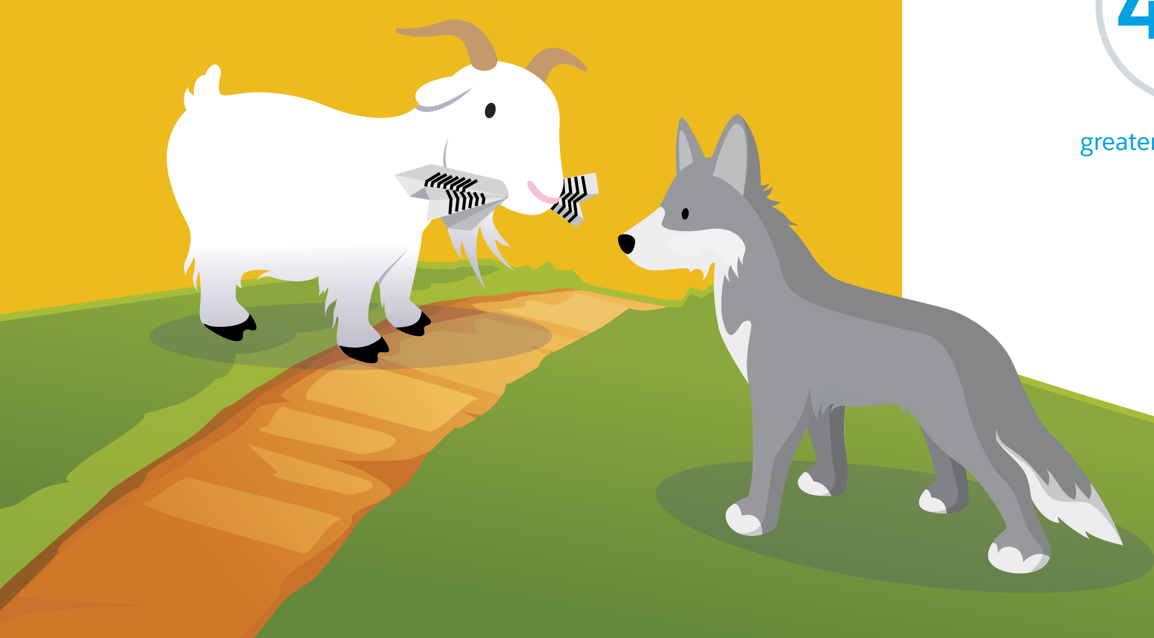
21% higher win rates

31% less time managing pipe

40% greater collaboration

29% faster reporting

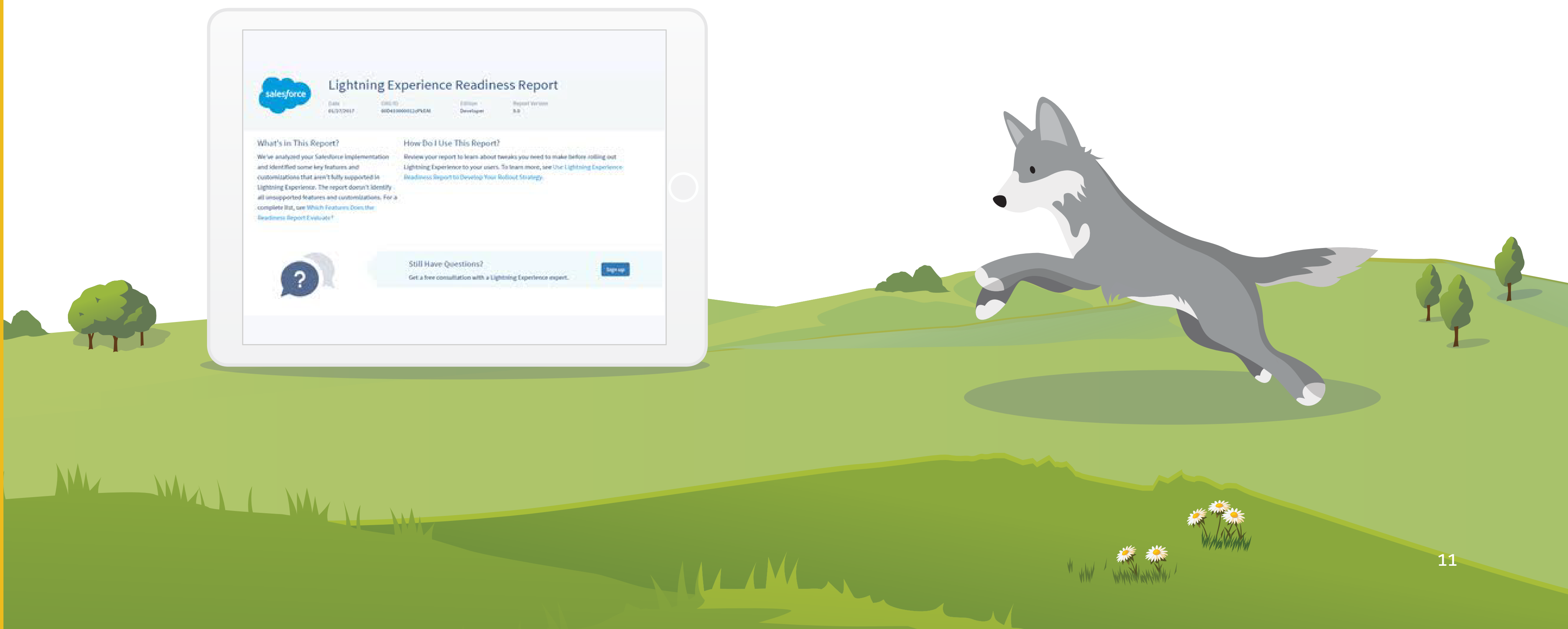
38% less time standardizing process



Readiness Check

Suffice it to say, if you haven't already made the switch to Lightning, you need to get on it. And that starts with the [Lightning Readiness Check](#).

When your admin runs the check, a PDF report will be generated. This report will identify any features or customizations in your org that will require special attention during the transition. The report also includes Salesforce's recommendations for how to proceed with the migration to Lightning, as well as an impact assessment. (Additional assistance is provided in the Lightning Experience Transition Toolkit, available on AppExchange.)



Lightning Accelerators

If you want to maximize the impact of Lightning from day one, Accelerators are key. We have about 20 Lightning Accelerators designed for every stage of your journey. And here are three of our most helpful Accelerators for making your successful move to Lightning.

- Sales Cloud: Lightning Fast Start
- Platform: Configuration & Customization
- Service Cloud: Lightning Transition Readiness

Interested in other Accelerators? Check out the Accelerator Library for the complete list and details.

Lightning Boost

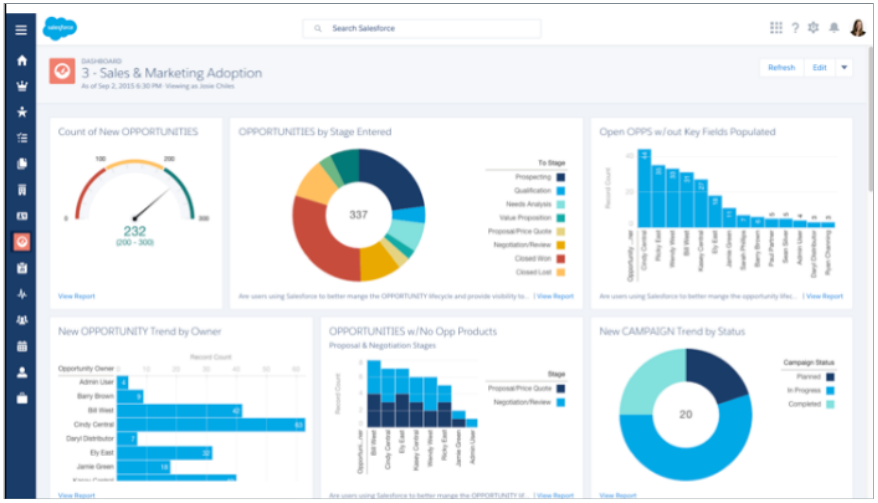
If you're interested in more extensive guidance, you should consider Lightning Boost. This is a 3–5 month engagement including workshops, assessments and working sessions that ensure your transition to Lightning will drive adoption and get your team working smarter, faster and more efficiently, ASAP. For more information on Lightning Boost, contact us.

STEP #5

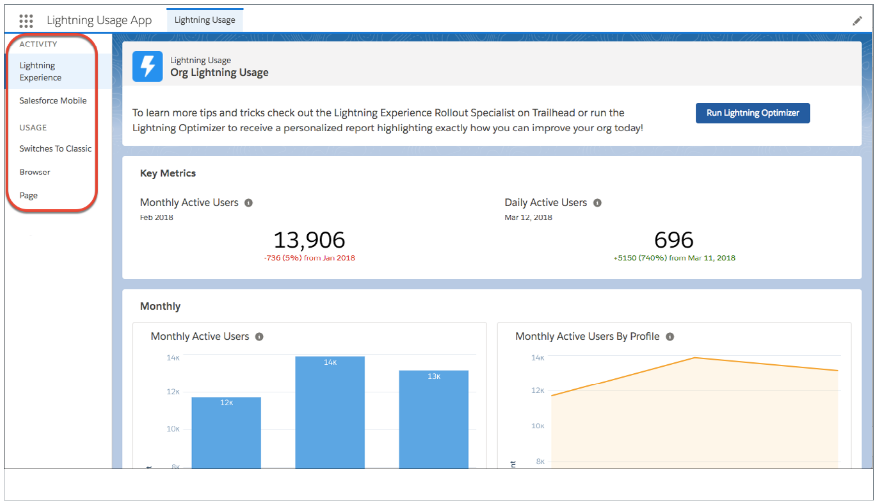
MEASURE WHAT'S WORKING

After making updates to your Salesforce org, you need to make sure those updates make a difference. Two tools that can help you measure your success are Adoption Dashboards and the Lightning Usage app.

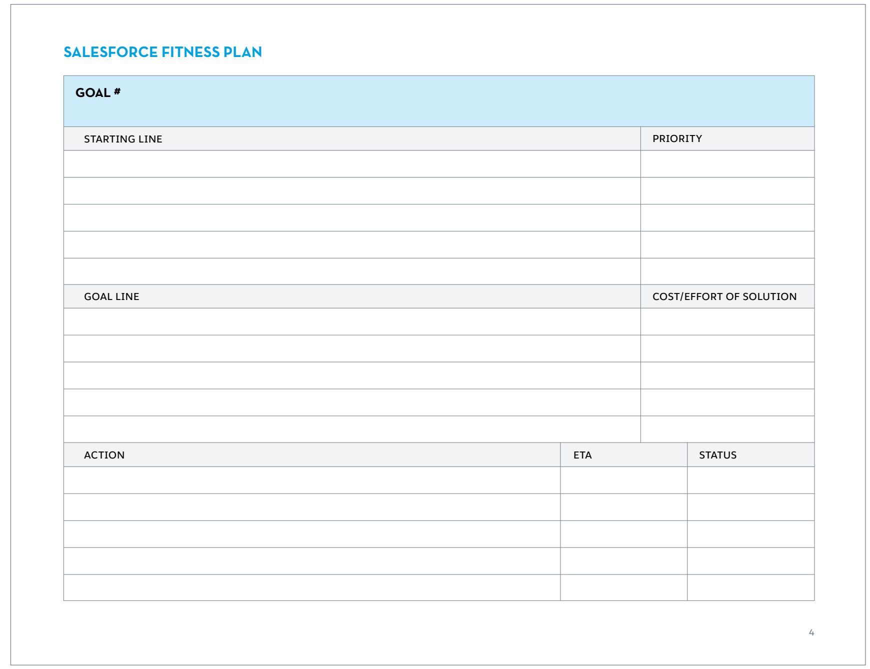
Adoption Dashboards – These dashboards provide visibility into how much people are using new features designed to enhance their productivity. To learn more about these tools, check out [Salesforce Adoption Dashboards on AppExchange](#).



Lightning Usage App – This app provides data specifically on your Lightning adoption rate – showing how much time users are spending in the new environment and how often they are toggling back to the classic environment. Get more information about the app here.



Your Salesforce Fitness Plan – Are you ready to get your Salesforce org into shape? Follow our Fitness Plan How-to to clearly define your requirements, set your goals, and commit to an action plan.



SALESFORCE FITNESS PLAN

GOAL #	
STARTING LINE	PRIORITY
GOAL LINE	COST/EFFORT OF SOLUTION

ACTION	ETA	STATUS

4

WHAT'S NEXT?

Now that we've covered these five crucial steps to maintaining the health of your org, let's take a look at a few tools and services to consider as you continue your journey, from do-it-yourself resources to hands-on, expert support.

Do-It-Yourself Resource: *"Achieve Your Goals with Salesforce Success Cloud"* *Trailhead Module*
This module will help you build the multichannel support powering the customer service experiences that are transforming businesses.

Guided Learning Resource: *Premier Success Plan*
Salesforce Premier Success Plans are designed to help you drive adoption, access expert advice, and boost productivity. If you're ready to move to the next level of Salesforce effectiveness, you can connect with us here.

Hands-on Support Resource: *Optimizer Rescue*
Optimizer Rescue is a five-week service engagement with a Salesforce technical architect providing hands-on help. It's a great option if you don't have the time or personnel to execute your updates and upgrades.

RESOURCES

- Want to learn how Premier has helped customers like you? Read their **inspiring stories of success**.
- Interested in Optimizer Rescue or upgrading your Success Plan? Connect with us **here**.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