



# SALES TRANSFORMATION THROUGH SALESFORCE





## A Typical Day of a Sales Consultant

When a company decides to outsource its sales efforts, it usually hires a sales consultant responsible for creating and implementing sales strategies. Whether it is developing a business's brand awareness or promoting a single service or product, a sales consultant's daily routine is robust and full of challenges.






The day begins with a quick review of upcoming appointments, deadlines, and tasks that need to be accomplished. The modern consumer base is tech-savvy, and a sales consultant must maintain an active presence on social media through regular morning posts. Next up is creating relevant content for the clients, especially if the job is that of an online sales consultant. Online market management also entails that the consultant reviews client websites and makes improvements through SEO strategies; this is crucial to boost their traffic and rankings. The last but most vital part of the day is reinforcing customer relationships by reaching out, analyzing data, and prioritizing new clients to establish competency. All in all, it's creativity, partnership, and teamwork that gets a sales consultant going through the day.

## The Need for Sales Transformation

It's the age of empowered, informed, and demanding customers whose dynamic needs shape the sales industry. Keeping up with the fast-evolving customer expectations is challenging, and the only way to thrive the long haul is to prepare your sales team and transform your sales process.

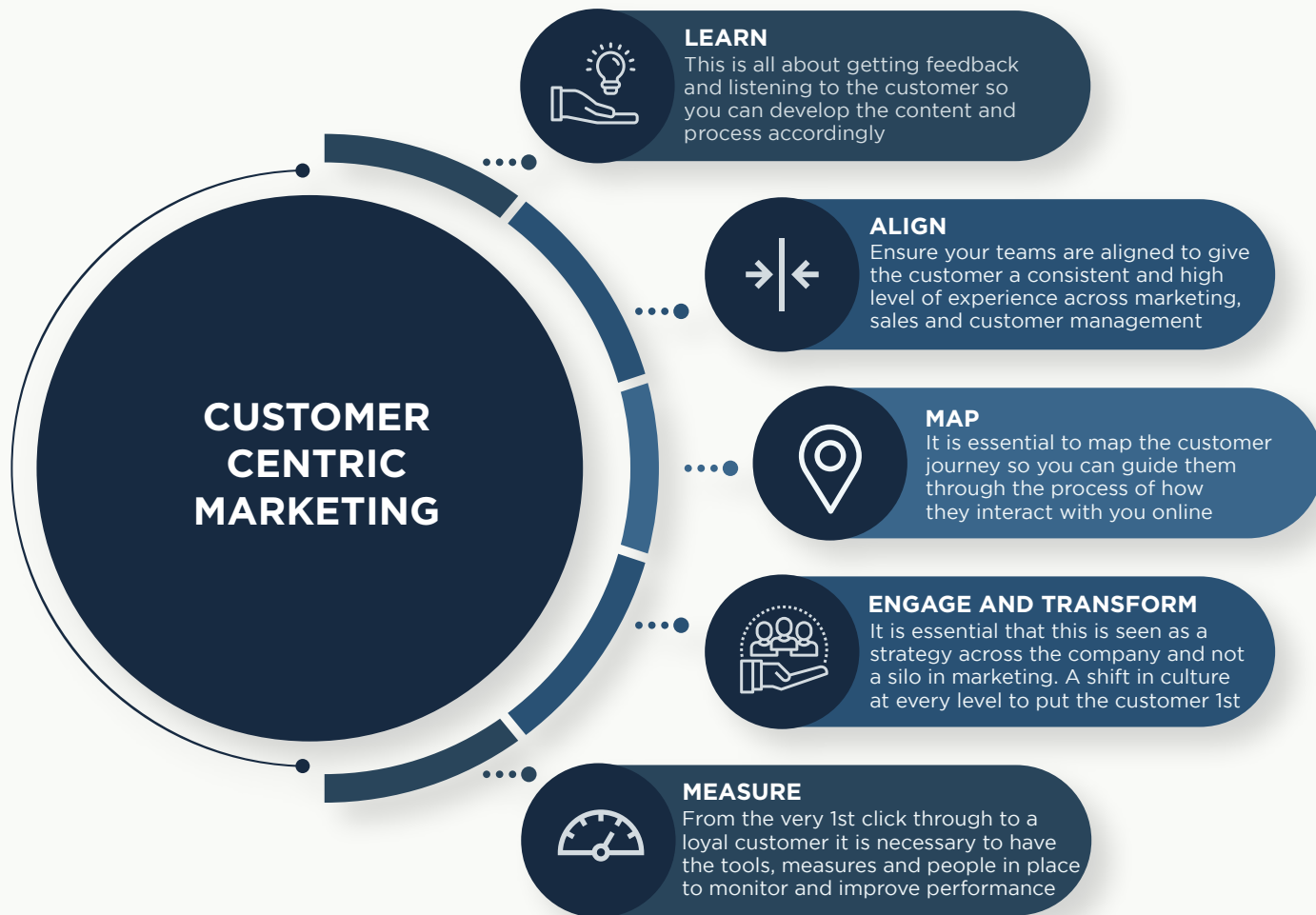
## Why Does Sales Need to Change?

Sales Isn't Going Anywhere, But It Must Adapt To Be Relevant To Today's Customer

 <p><b>New buying behaviours &amp; preferences</b></p> <ul style="list-style-type: none"><li>• Marketing ownership of early funnel</li><li>• Sales must add more strategic value</li></ul>	 <p><b>More customer-facing channels &amp; functions</b></p> <ul style="list-style-type: none"><li>• Sales can no longer own the customer</li><li>• More cross-functional integration is required</li></ul>	 <p><b>More digital interactions &amp; data than ever</b></p> <ul style="list-style-type: none"><li>• Sales must be empowered with information</li><li>• Data &amp; tech-savvy must lift to leverage this</li></ul>	 <p><b>The need to do 'more with less'</b></p> <ul style="list-style-type: none"><li>• Acquisitions costs must reduce, whilst lifting CX</li><li>• Channel mix must evolve to optimise resources + CX</li></ul>	 <p><b>Changing competitive dynamics</b></p> <ul style="list-style-type: none"><li>• The CX is increasingly defining sales outcomes</li><li>• Need to transform faster than competitors</li></ul>
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**Binging about a sales transformation in a digital age is all about shifting to a more client-centric approach**



## Key Benefits Your Sales Reps Can Expect

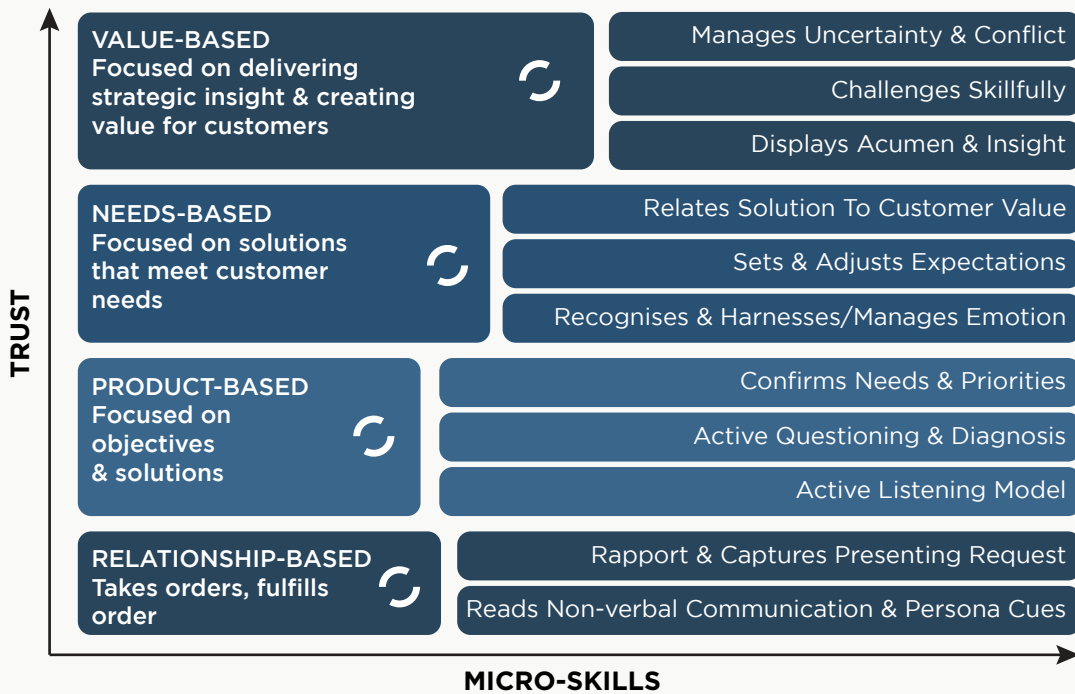


A sales transformation is not limited to enhancing the customer's experience; it also involves building on the sales representatives' skills and capabilities through sales training programs. The performance of the sales organization is dramatically enhanced as more representatives achieve the sales quota with a lower turnover rate of the sales force. Following is a case study illustrating how sales transformation drives a representative's growth and overall progress.



# Talent & Capabilities - Case Study

Challenge - A Major ICT Firm With a Large Retail Distribution Network Needed To Enhance The CX Across Sales Channels



## RESULTS

Salespeople were better attuned to customer pain points, significantly enhancing 'cut through'

## LESSONS

- Winning 'hearts & guts' is essential to prepare the field
- Build on existing capability find people's 'learning edge' & expand
- Embedding & coaching must be built into the intervention
- Small steps & repetition is key to embedding change

## Sales transformation Through Salesforce



### What is The Salesforce Platform and Why Should You Choose It?





Salesforce is a cloud-based software company that offers Customer Relationship Management (CRM) services through it's holistic and "360-degree view" approach. It claims to bring together customers and companies so that each organizational department, be it sales, marketing, services, or IT, get a shared, comprehensive view of the customers and their needs.

But how does Salesforce help your team? To be precise, Salesforce's holistic approach to view customers significantly lessens the time a company would take to fix customer issues. Hence, it provides a way to enhance customer relationships and personalize them through quick elimination of redundancies in communication. Moreover, Salesforce offers completely digital tools so that your response to customer needs can be quick and feasible.

# Solution Framework of Salesforce



The industry has shifted from the conventional on-premises CRM to the cloud-based CRM to address businesses' change management and scalability needs. Salesforce is the undisputed leader in adopting applications that are quick to roll-out and are customizable, quick-to-implement, user-friendly, and semantically-integrated.

 <b>Client side Scripting</b>	 <b>Portal Development</b>	 <b>Integration</b>	 <b>Force.com Platform</b>
Embedding with JavaScript Framework  Visualforce Pages  JavaScript Remoting  Heroku (Java, Ruby)	Customer self service portals (B2B)  Vendor portals (B2B)	Web service integration  Partner or enterprise WSDL  Desktop  Outlook  Cloud integration	Custom objects, extending standard objects  Configuration  App exchange components  Email template  Classes, triggers, controllers  Batch apex, workflows, and approvals
<b>Salesforce Technical Expertise</b>			



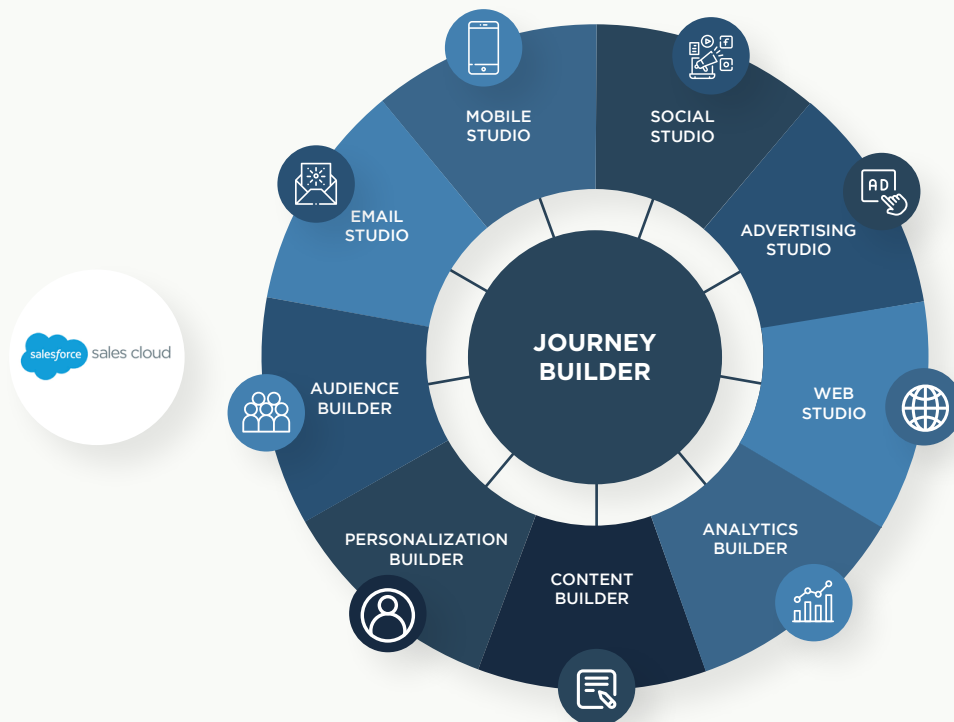
- **Sales:** Enhance customer communication by evolving and implementing a precise and repeatable sales process.
- **Marketing:** More upselling opportunities, improved lead generation, and customer acquisition by customizing marketing messages on the right channel.
- **Service:** AI-powered consistent, and personalized support at every customer interaction point.
- **Commerce:** Engage customers, boost revenue, and connect business through coherent and straightforward commerce experiences.
- **IT:** Increase productivity through automation, build apps that meet the needs of all stakeholders, and improve transparency, security, and scale through IT solutions.

Department 	Customize Salesforce platform for... 
IT	• Streamlining the ticketing system
HR	• Streamlining and automating the hiring process
Supply chain	• Logistics • Vendor management • Procurement
Product	• Ideas and innovation • Pre-production testing • Warranty management
Finance	• Pricing • Contract management • Budget management
Operations	• Business agility • Enabling merger and acquisition • Management of assets and facilities

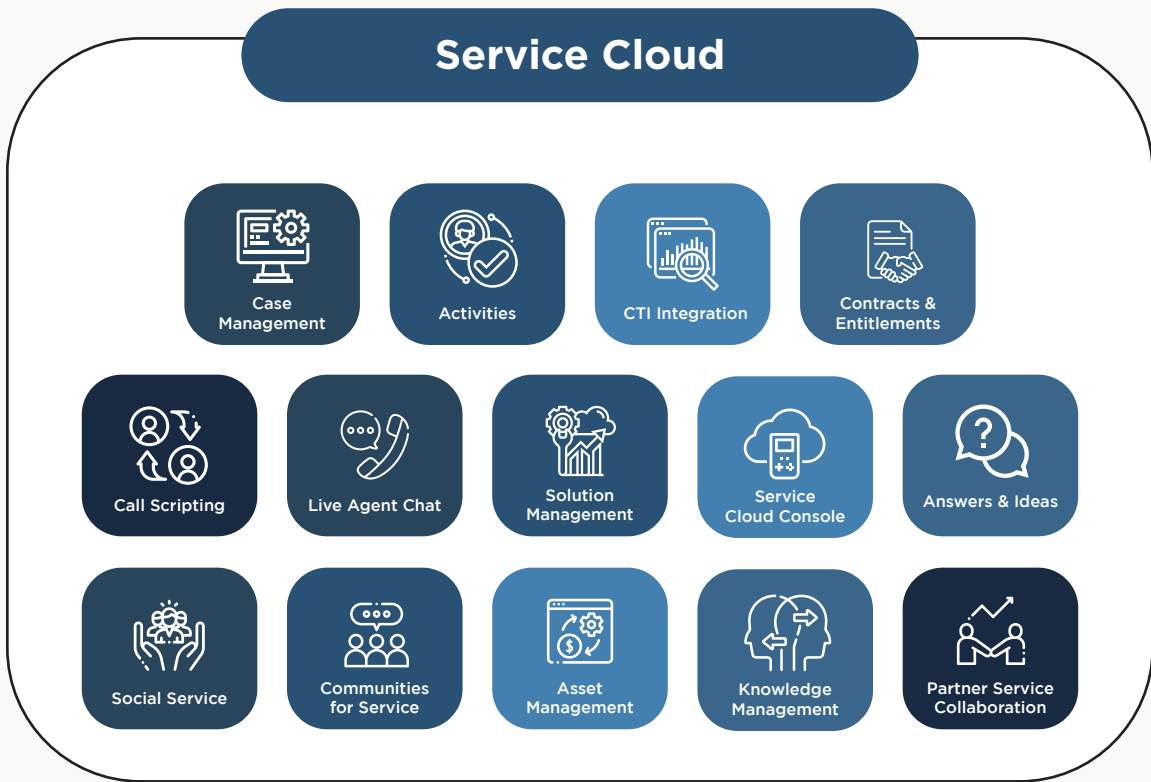
# An Overview of Salesforce Products That Drive Sales Transformation



Sales Cloud: For automation of sales activities. It includes Salesforce CPQ, Salesforce Inbox, Sales Analytics, Partner Communities, Lightning Dialer, Sales Cloud Einstein, AppExchange, and Salesforce



Marketing Cloud: For creating extraordinary customer journeys through personalized experiences across web, mobile, email, advertising, social network, and more.



Service Cloud: A flexible, intuitive, and responsive support to strengthen your customer service.



### Pardot Capabilities

- Easy Email Marketing
- In-depth Prospect Tracking
- Salesforce Integration
- Powerful Lead Nurturing
- ROI Pipeline Reporting
- Prospect Grading & Scoring
- Sales & Marketing Collaboration

Pardot B2B: For driving cooperation between sales and marketing teams



# Einstein Analytics



Einstein Analytics: An AI platform with advanced data capabilities

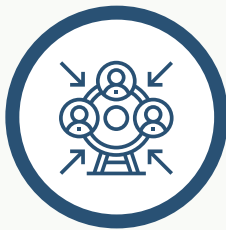
# myTrailhead

## Four Key Use Cases of my Trailhead at Salesforce

Empowering and elevating our employees



**Onboarding  
New Employees**



**Culture &  
Employee Success**

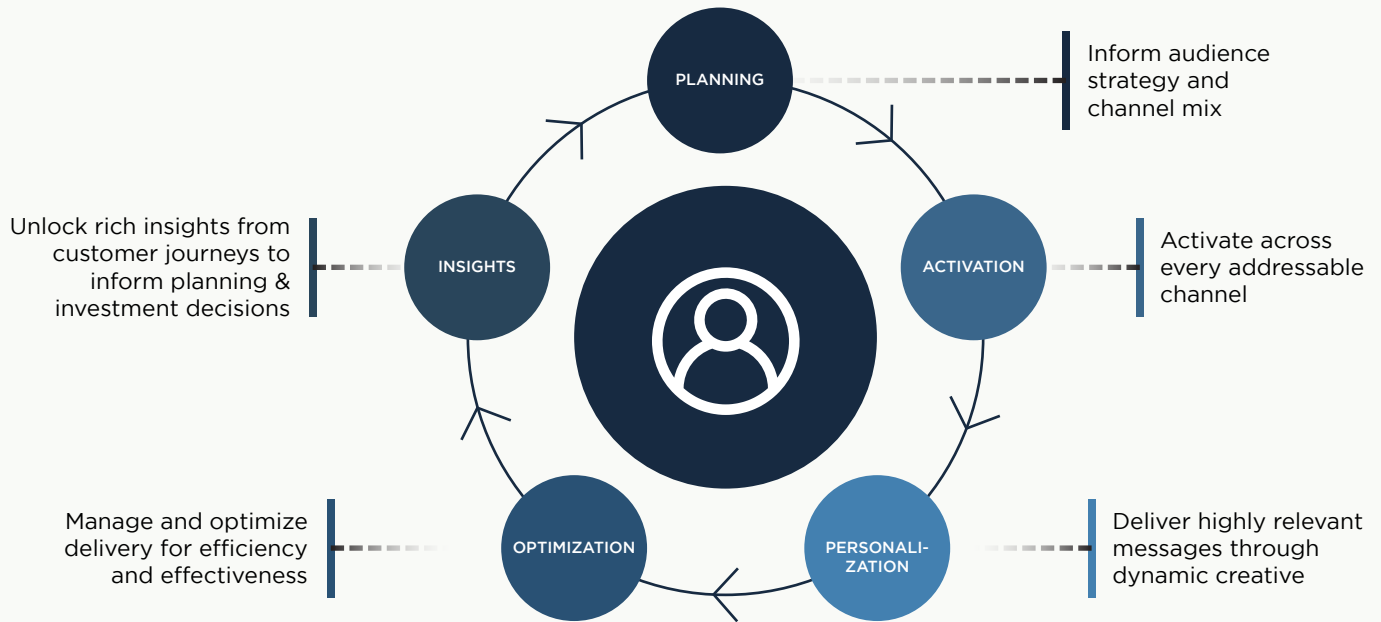


**Product  
Readiness**



**Leadership  
Development**

## Customer 360 Platform



A unified customer database for universal across the organization - it empowers the workforce and enhances customer experience.

## How Can BidsandBeyond Help?

Our transformation framework works across Customer Discovery, Customer Acquisition, and Customer Experience to bring value to your business.

- Improve your win rate through our experienced bid consultants' winning strategies.
- We work with a relay model, reducing turnaround times with better response and coordination across different time zones
- With our seasoned team, your total cost of optimization gets significantly reduced
- Our Design Thinking approach will help you re-calibrate and refresh your sales strategies
- We will automate your entire sales and marketing process while your sales consultants can attend to relationships.

There's more to us! We help you define the sales and marketing roadmap for your organization, choose the right products of Salesforce and customize, implement Sales Cloud, Marketing Cloud, Service Cloud products, and help you create custom apps and workflows for sales and marketing.

## Conclusion

Today's rapid-paced and fast-evolving business environment is continually pushing companies to adopt new technologies that conform to market conditions. The changing market dynamics have led to increasing demand for agile methodologies that offer quick and cost-efficient solutions to the IT market and businesses. Transforming the sales process forms a crucial part of this revolutionary journey that focuses on a new generation of data-driven and demanding customers. With Salesforce, your sales process transformation can get a whole new dimension. From automating tasks to providing leadership, Salesforce products will not just propel your sales team towards agility, but will also offer a comprehensive view of sales activities and customers.

## About BidsandBeyond

BidsandBeyond is young and nimble business consultancy, helping businesses in the bid consulting and growth consulting areas. The areas include winning more bids for our clients,, ideating & designing new products, automating the entire sales & marketing journey through Adobe & Salesforce, account-based marketing, thought leadership writing and pitch playbooks.



Capability Summary



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