

SALESFORCE ROADMAP FOR BETTER SOLUTION

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Abstract: Now a day's cloud computing is a fastest growing technology that are very demanded technology, that provided services like Infrastructure as a Service, Platform as a Service & Software as a Service. The Salesforce is a reputed organization in the field of cloud computing, initially they start with CRM (SaaS Service). Now they also provided platform with the help of Force.com, Heroku. Salesforce Roadmap provides you with a complete understanding of all your business software systems, not just CRM and not just Salesforce. Salesforce Roadmap, you gain a complete understanding of all your business software systems, not just CRM, and not just Salesforce. Without this analysis, it's much more difficult to be truly effective with a system that doesn't match what you need it to do in business. Salesforce roadmap is describes key business challenges you're trying to solve by implementing Salesforce, and also it Define the reports you need to manage your business effectively.

IndexTerms - Customer Relationship Management (CRM), ROI (Return of Investment)

I. INTRODUCTION

Salesforce is a significant investment so achieving the desired business result is vital. Setting yourself up for success, revenue growth and long-term value depends on creating a strong Salesforce Roadmap that puts in writing how Salesforce will transform your business beyond the foundation of a CRM system [1]. Salesforce is a powerful platform that can be leveraged to streamline and grow many areas of your business. The challenge is understanding your options and developing a plan that guides your business systems, processes and people 1, 3 and 5 years from now.

1.1 Big Picture Vision for the Future

Many customers overlook creating a Salesforce Roadmap [1]. Yet incomplete or poorly executed Salesforce Roadmapping is a common pitfall that can cause low ROI, major adoption issues and customer attrition. With a Salesforce Roadmap, you gain a complete understanding of all your business software systems, not just CRM, and not just Salesforce. This big picture analysis is crucial to identifying challenges and opportunities that enable you to build the best solution for your business needs.

II. SALESFORCE ROADMAP

The capabilities of Salesforce Cloud offerings, and AppExchange products, are not often fully understood. This causes customers to miss out on value because they see Salesforce as "just a CRM." A Salesforce Roadmap sets the vision for how your organization will get the most value out of Salesforce, especially by taking it beyond CRM. Customers who are achieving the most success with Salesforce are leveraging the platform to streamline other areas of their business in addition to sales and marketing, including customer service, operations, accounting, HR and other departments.

2.1 Salesforce Roadmap will

- Define the reports you need to manage your business effectively
- Identify all systems and data that will need to integrate and address how they will be integrated
- Explain how you'll achieve a full 360-degree view of the customer at all times

2.2 Responsible for Creating a Salesforce Roadmap

An experienced Salesforce consultant will help your internal Salesforce Steering Committee develop a "happy path" to success that's right for your business. Your consultant will help with big picture oversight and technology selection while you're internal Salesforce Steering Committee will help identify needs, budgets, timelines and implementation plans.

III. BENEFITS OF A ROADMAP

The right Salesforce Roadmap will help you achieve strong user adoption and make a real impact on your bottom line.

3.1 Business Growth & Transformation

Expanding Salesforce beyond CRM helps businesses achieve true transformation. Most businesses struggle with ineffective and inefficient business software systems in operations, accounting, HR and customer service. Employees in these businesses often still use ad hoc systems such as spreadsheets, email and even sticky notes to manage their work. Lack of shared data and effective reporting systems puts businesses at risk of losing data, which jeopardizes deals.

A Salesforce Roadmap will facilitate growth by helping you streamline areas such as:

- Customer service
- Marketing
- Configure-price-quote
- Demand management
- Communities (and portals)

One pitfall that commonly causes adoption issues is only focusing on the CRM or “win” stage of the sales process. Salesforce products however combine to help you attract, win and keep customers through an integrated, closed-loop approach for a 360-degree view.

Customers today want a delightful experience. One way to do that is to make it easy for them to do business with you. From their first call with a sales rep who has prospect data in hand to make informed product or service recommendations; to quick proposals and quotes; to an easy invoicing and payment process; to visibility over customer service issues and work tickets; every aspect of the business must work together in a cohesive and streamlined way. This creates a compelling competitive edge and improved loyalty.

Your implementation roadmap [5] is closely aligned with the business value plan it synchronizes the delivery and realization of value with the plan for implementation. To get the resources you need, your decision-makers must prioritize your project as a strategic initiative. As part of your roadmap story [5], expose the capability gap between your current and future states so that it's clear what has to be done to achieve the vision you propose. You can use three key deliverables together to communicate the roadmap to success.

IV. NEED TO DO ROADMAPPING

While some Salesforce customers purely want to use Salesforce as a CRM and that's it; others want to use it for many other areas of their business [1]. Naturally, some businesses will have a more robust and extensive Roadmap than others. Regardless of how deep you implement Salesforce, it's still worthwhile to complete a Roadmap so you develop an ideal system and processes that are fully aligned.

4.1 Established Companies

For established enterprise and mid-market companies, having the right Salesforce Roadmap will address integration challenges, as well as areas of the business beyond CRM where Salesforce could be leveraged.

System integration can be a major benefit of a strong Salesforce Roadmap for established companies. Disparate systems, incomplete data and inconsistent views of the customer commonly cause a lot of added work, adoption issues and inadequate reporting. Considering the massive amount of data spread out among multiple departments, geographic regions and IT systems, integration is a key step to ensuring the best value possible from Salesforce.

It's important to conduct a thorough ROI analysis to see what impact the Roadmap will have on business KPIs and objectives. There are often creative solutions that will help you accomplish your vision and goals in cost-effective, results-driven ways.

4.2 Small Businesses Poised for Rapid Growth

Small businesses such as technology startups poised for substantial growth also stand to benefit from Salesforce Roadmapping. Salesforce enables rapidly growing companies to quickly scale IT systems to handle functions such as customer service, pricing and invoicing.

V. BUILD A SALESFORCE ROADMAP

Step 1: Define your business problem, KPIs and goals

Salesforce and other software systems need to fully align with your business strategy [1], your people and processes in order to supercharge your sales and profits. Defining the problems you want to solve lays the groundwork for the discovery process in next step, when you get to the root cause of those challenges. Remember, your technology is only as good as the people and processes behind it. When all three aren't in sync and fully optimized, you'll likely experience more lackluster results.

Step 2: Thorough discovery

Salesforce Consulting Partner and internal Salesforce Steering Committee need to embrace that a successful Roadmap for your organization requires a thorough project “Discovery” of your needs and requirements, current state and gaps in order to identify the best plan to solve your business problems. The Discovery should give you an in-depth understanding of your needs, challenges, goals, business processes and expectations. A good Salesforce consultant will help you get to the root of your business and adoption challenges identify inefficiencies that are limiting revenue growth, and propose solutions that ensure the end product solves real problems and produces real results.

A proper Discovery is a crucial step in creating a Salesforce Roadmap that supercharges your organization, yet it's often a hurried and incomplete process. A good Salesforce Consultant will take the time necessary to truly learn your business up front and avoid making assumptions that lead you down the wrong path, causing you to waste time and go over budget. Most Salesforce customers want to get up and running quickly with a Salesforce project to start realizing a high return on their investment. But think of it this way you wouldn't want a doctor giving you a prescription before a diagnosis, would you? Doing your due diligence up front will go a long way in minimizing adoption issues and preventing system failure. How long a discovery takes may depend on several factors, including the complexity of your business, extent of the problems you are trying to solve existing software systems that may need integrated and more.

Step 2.1 Post-Implementation Discovery

Ideally, a strong discovery is done up front before your initial implementation. However, if you are past the initial rollout of Salesforce [1], and are finding that it's not fully optimized and producing the results you want, it's time to re-visit the discovery phase with a Salesforce Consultant experienced in your industry. The sooner you can identify pain points and develop a solution that addresses your challenges, the sooner you can start realizing more value and effectiveness.

Step 3: Build High-level system requirements

After completing a thorough diagnostics of your goals, plans, challenges and timelines, your consultant will help you build effective requirements that will guide an initial implementation or subsequent release. We encourage clients to list out "must-haves" and "nice-to-haves" in a cradle-to-grave format. A strong consultant will identify the best solutions to match your needs, budget and timeline.

Step 3.1 Difficult Requirements

Poor system requirements are the leading cause of systems project failure. Building system requirements in a way that ensures the end product fulfills the goals and vision is no easy task. That's why carefully selecting an experienced Salesforce Consulting Partner is crucial.

Common difficult requirements:

1. Project scope not well defined or agreed on
2. Not enough detail and omissions.
3. Communication breakdowns
4. Not the right people involved and Out of control changes or new requirements.

Step 4: find Plan for innovation

You have a compelling vision for how you initially want your Salesforce system to work. But after completing a solid discovery, you realize how else Salesforce can benefit your organization. This is the innovation phase of your Salesforce Roadmap. Set expectations for when and how you will expand deeper into the Salesforce platform for more value. The innovation stage is really where you can get creative and uncover ways to generate a competitive advantage. For example, can you build a custom pricing app on Force.com that enables your sales teams to provide pricing to prospects much sooner than competitors? Or, can you integrate your CRM and accounting systems to automate invoicing with workflows? Opportunities to expand Salesforce are plentiful but you need to put your vision to paper so you can design budget and plan resources accordingly.

Step 5: Establish timelines

Establish timelines for when you need to achieve your business goals and how your technology, people and processes will support that [2]. Think about if you'll need to hire resources and how long that process may take. Consider "nice to have" vs. "need to have" in your implementation plan by priority. Many times, desired functionalities can be rolled out over time.

Step 6: Build the right support team

A strong Salesforce team will support your Roadmap and continued adoption. The work does not stop when Salesforce is implemented. With three new releases a year and changing organizational needs and challenges, you must continue promoting adoption and process improvement after the initial push. Especially when you want to take Salesforce further with your Roadmap, you must gain buy-in from your executive team and users. Having the right number of administrators, and the right people for the job, is critically important to the success of your Salesforce environment. So too is giving your administrators the right tools to do their job effectively, such as Salesforce administrator training and certification.

A full-service partner offering integration, development, training, managed services and other services will give your internal team access to experienced resources that can help you tackle work on a project basis. Make sure you are clear with your consultant how roles will be divided between internal and external resources.

Table 1: Salesforce administrators per number of users

Number of users	Administrator resources
1-30	1 full or part time administrator
31-74	1+ full time administrator
75-149	1 senior admin, 1 junior admin
150-499	1 business analyst, 2-4 admins
500-750	1-2 business analyst, 2-4 admins
>750	Varies, depending and multiple factors

VI. ONE OF THE BEST CRM APPLICATIONS

Name of this application is Google contacts; it is of course just an address book that's built into Gmail. And yet, it's more than an address book [4]. You can add just about any possible contact info to your contacts, and Google will automatically update contacts with their Google+ information, as well. Then, you can also keep plain-text notes on contact pages. That is a great way to track, say, info that you'd otherwise add to a contact's page in a CRM.

Then, there's an extra trick in the top right of the Google Contacts page. Tap more, and you can see a list of all your recent correspondence with that contact [4]. Select an email, either there or in your inbox or anywhere else, and you'll see your contact's info on the right side like with many CRMs add-ons. It's not marketed as a CRM, but put these features to use first and you'll have a part of the power of a CRM for free without even having to try a new app.

CONCLUSION

Today, most of the companies about that they must digitally transform to survive, and they should initiate a relevant project in the short term [3]. We typically recommend companies start building their roadmap six to nine months prior to their negotiation. You are going to want at least three months to handle the actual negotiation with Salesforce so a six month runway gives you an additional three months to get that internal alignment each organization is different, but that internal alignment won't happen overnight. Give yourself some time to meet with all key stakeholders and achieve that internal alignment.

It can Identify all systems and data that will need to integrate and address how they will be integrated using Salesforce.com. A strong partnership with digital transformation industry leaders, along with cloud orientation and effective project management, provides the necessary guarantees for successful project completion.

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