



SalesFix

Create, Communicate with and Close MORE Leads

How to grow existing business
revenue and keep your customers
happy, using the Salesforce platform

27 April 2017

A blue-tinted photograph of two men in business suits sitting at a table. They are looking at a tablet computer. The man on the right is pointing at the screen with his right hand. There is a glass of water on the table in the foreground.

SalesFix and customer

Why

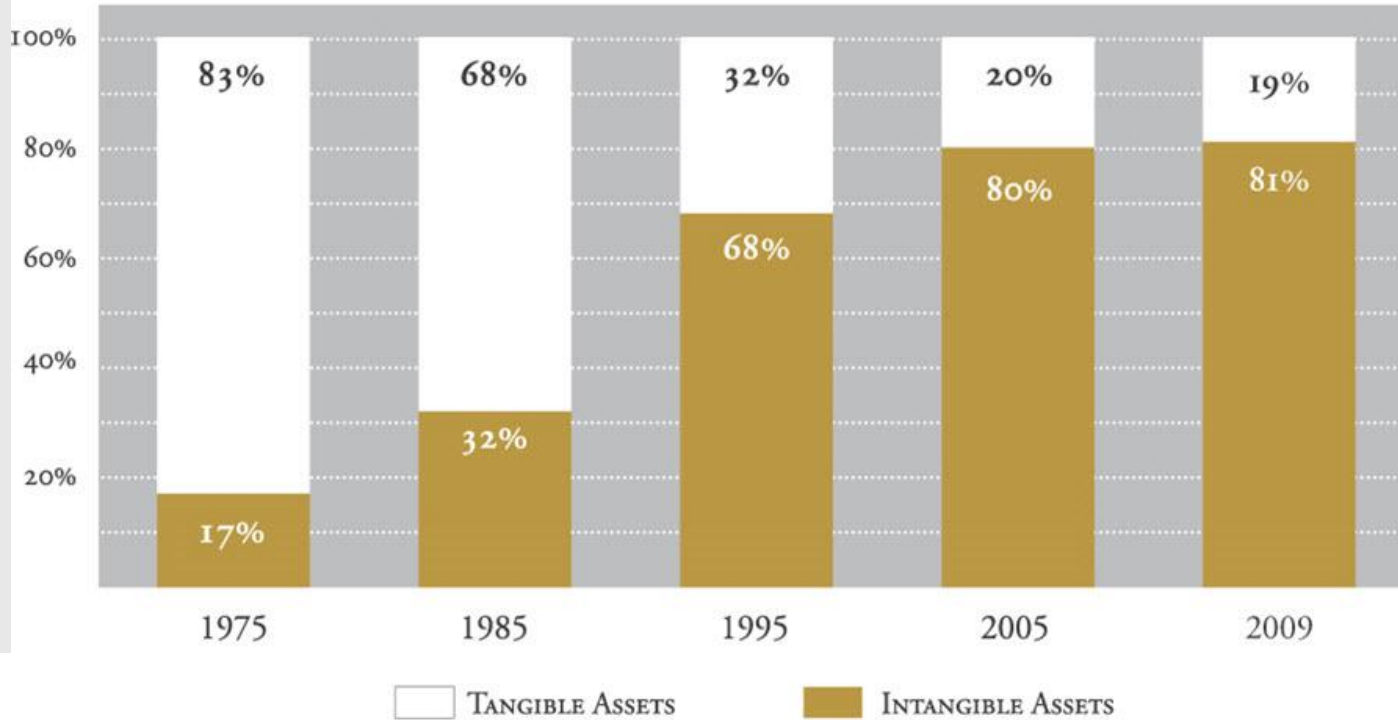
“In today’s information-centric and intangible-asset driven society, looking to the net worth line to determine a company’s value would be the strategic equivalent of telling a farmer that the total value of his farm is limited to the projected wholesale value of the harvestable crops he currently has in the field. Such a valuation methodology would fail to take into account the intrinsic worth of his knowledge, his distribution channels, **his relationships**, his land, his future assets, **his systems, his processes** and his leadership skills.”

Source:

Harvesting Intangible Assets: Uncover Hidden Revenue in Your Company's Intellectual Property
by Andrew Sherman

Harvesting Intangible Assets

COMPONENTS OF S&P 500 MARKET VALUE



Source:
Ocean Tomo
Presentation by:
Andrew J Sherman



Intangible Capital



Human Capital



Structural Capital



Relationship Capital



Strategic Capital

Source:
Andrew J Sherman
<https://www.amazon.com.au/d/ebook/Harvesting-Intangible-Assets-Andrew-J-SHERMAN/B005P6B8GY>

Acquiring new Customers is hard;
looking after your existing customers is easier, thus leveraging another of your intangible assets.

68%
of customers
LEAVE

because they perceive that you are indifferent to them.



A 2% increase in customer retention *has the same effect* as decreasing costs by 10%.



Depending on the industry, reducing your customer defection rate by 5% can increase your profitability by 25 to 125%

5 TIMES
the cost

Acquiring new customers can cost *as much as five times more* than satisfying and retaining current customers

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SalesFix and customer

How

Four Pillars of Customer Success

Customer Success drives Revenue Growth



Revenue Growth



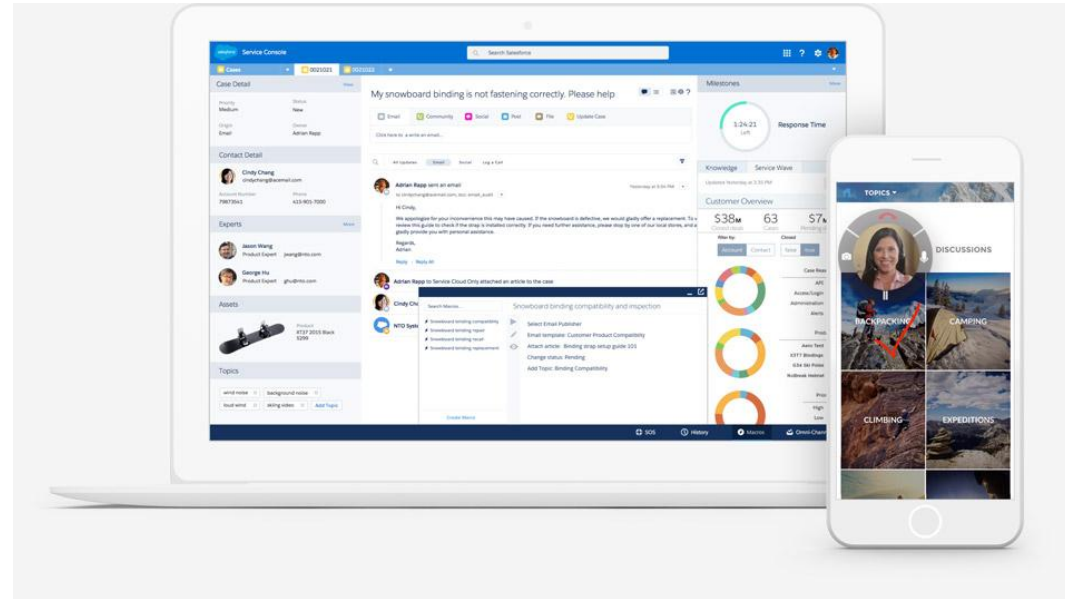
Pillars

- ✓ Customer Services
- ✓ Proactive Account Management
- ✓ Cross / Up Selling
- ✓ Analysis & Analytics

Salesforce Service Cloud: Customer service software in the cloud that really delivers.

6 Reasons Why Ticket Tracking Software is Better than Email

1. Everything is centralized in one place
2. Provides built in tracking and reporting metrics
3. Helps prioritize workflow
4. Adds transparency
5. Fosters collaboration
6. Ensures continuity



Source:

<http://blog.capterra.com/6-reasons-why-ticket-tracking-software-is-better-than-email/>

Install High Five! Fields

- Date of Last Won Deal
- Count of Opportunities
- Count of Won Opportunities
- Win Percentage
- Total Value of Won Opportunities

Other 'Roll-ups'

- Count of Open Opportunities
- Count of Open Cases
- How many Contacts
- How many tasks this week

Account Dashboard ideas

- Expected Revenue by Month
- Cases Status Summary
- Account Sales Year on Year
- Account Sales Month on Month
- Sales Amount by Product Type
- Sales Quantity by Product Type

High Five! Fields

Count of Opportunities ⓘ

164

Count of Won Opportunities ⓘ

118

Win Percentage

71.95%

Count of Open Opportunities

20

Count of Open Projects

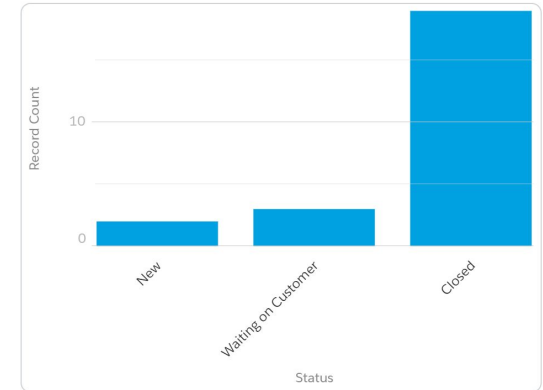
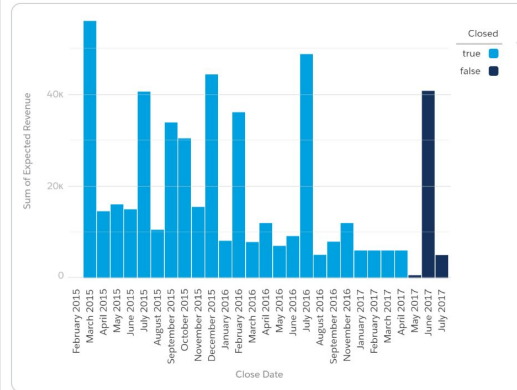
4

Date of Last Won Deal ⓘ

4/04/2017

Total Value of Won Opportunities ⓘ

AUD 986,644.43

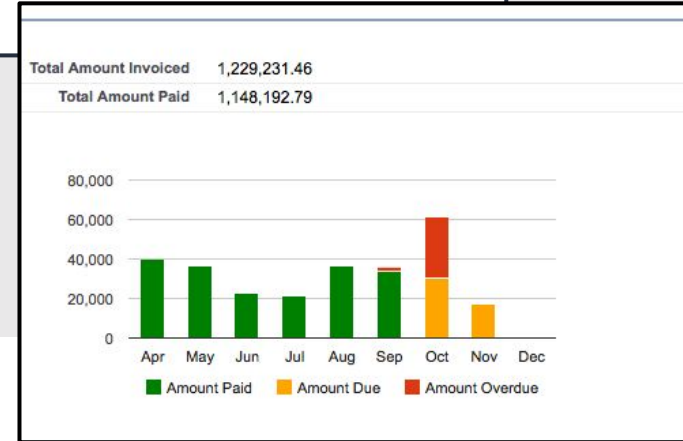
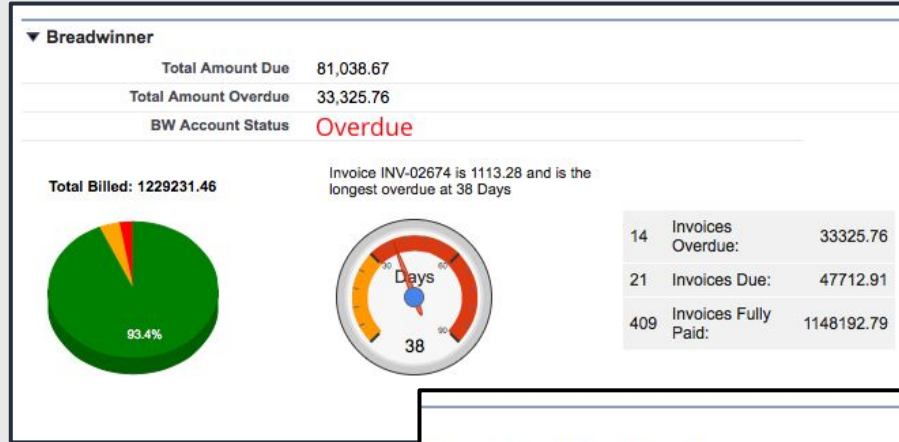


What

- Bring in Invoice data from Finance system to Salesforce
- Present this data to Account Managers
- Help Report on Whitespace
- Report Accounts without recent invoice etc.

Solutions

- Breadwinner for Xero/Salesforce or Breadwinner for Quickbooks/Salesforce
- Skyvva Integration Suite
- MYOB (AccountRight Live) Connector for Salesforce



Links: **Breadwinner:** <https://breadwinner.com/xero-salesforce/>

MYOB Connector: <https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B5Y8IEAV>

SKYVVA: <https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003IsNZEAO>

Benefits

- Know how often and how many Visit or Phone Calls are needed to manage your Accounts
- Visibility of which Accounts are not getting a Visit / Call on time
- Identify which Account Owners (reps) need support

Solution

- Visit Cycle Field & Call Cycle Field
 - Values = Fortnightly, Monthly, Bi-Monthly, Quarterly, Half Yearly, Do Not Call/Visit
- Last Call Date field & Last Visit Date field
- Activity Type Field exposed to users
 - Values to include “Face to Face” & “Outbound Telesales”
- Trigger to update the Last Call or Visit Date
- Workflow to update the Next Call or Visit Date
- List view of My Accounts due a Call this Week
- Reports & Dashboard

Sales & Service			
Call Cycle	Quarterly	Visit Cycle	Quarterly
Last Call	24/04/2017	Last Visit	10/04/2017
Next Call Due	24/07/2017	Next Visit Due	10/07/2017
Days since last call	1	Days since last Visit	15

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Leverage the Appexchange

- Strategic Account Manager
- Relationship Map
- Account Whitespace Map
- GetFeedback to Survey Customers

Contract Management

- If you sell any services on a contract term that needs to be managed at renewal:
 - Use the Contract Object to store the details 'terms' of the Contract.
 - Create a renewal Opportunity at Close Won with a Close date on the same date as the expiry date

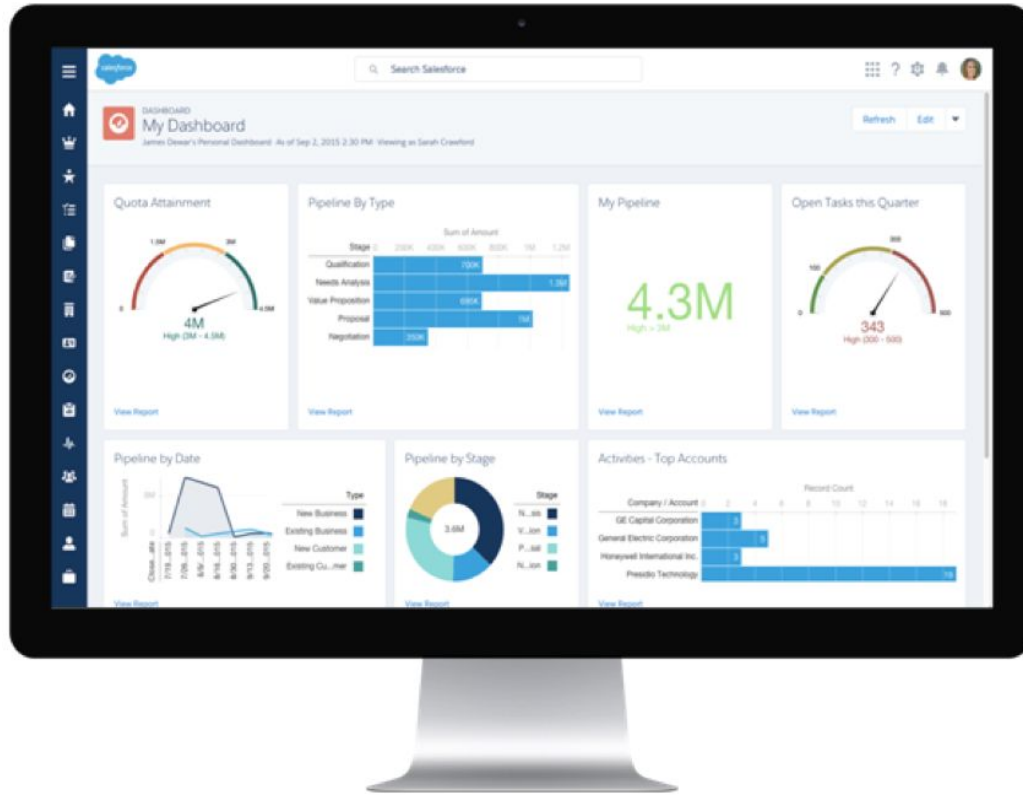
Links:

<https://appexchange.salesforce.com/results?keywords=account+management&filter=1>

Salesforce Appexchange: Customer service software in the cloud that really delivers.



Analytics



Pro Active reports

- Customers due a visit this Month
- My Customers Opportunity pipeline
- Customer sales history

Exception reports

- Active Customers without an Opportunity
- Accounts with an overdue visit

10 Simple & useful reports to know your customers better

- Account activities last 7 days
- Accounts by country
- Accounts by industry
- Accounts by state
- Accounts by type
- Accounts modified last 7 days
- Contacts by country
- Contacts by state
- Contacts by title
- Contacts modified last 7 days

Report Appexchange App: <https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003ID26EAG>

Any questions?

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