

SALESFORCE IMPLEMENTATION SERVICES

Customized solutions for your industry and company



CONSTRUCTION PRODUCTS & SERVICES

- Increase revenue with greater visibility to projects
- Influence project specifications earlier in the sales cycle
- Quote multiple sub-contractors for the same job
- Manage complex distribution networks
- Integrate CRM with quote and accounting systems
- Track success with dashboards and reports



GOVERNMENT CONTRACTORS

- Improve win rates by collaborating with real time information
- Increase visibility of solicitations and task orders to the team
- Track the capture process and milestones
- Forecast and manage proposal workload
- Manage talent acquisition for contracts
- Monitor progress with dashboards and reports



MANUFACTURING

- Grow business with greater visibility of Opportunities
- Enhance backlog planning with improved pipeline
- Configure, price and quote rapidly to win
- Manage complex distribution networks
- Provide visibility across decentralized operating models
- Integrate CRM with quote and accounting systems



PROFESSIONAL & FINANCIAL SERVICES

- Increase sales with greater visibility to relevant opportunities
- Capture complex influencer relationship networks
- Track communication in one place from multiple users
- Enable enhanced collaboration around a sale
- Integrate marketing and sales efforts
- Provide a single reference for sales collateral

HE Salesforce Capabilities

- Sales & Service Clouds
- Marketing Cloud
- Community Cloud
- Wave Analytics
- Einstein Artificial Intelligence



HE People

Having the right people on the project team are what makes the project successful. HigherEchelon has proven ability to recruit technical teams... with consistent double digit year over year growth. HE has time tested techniques to bring the right specialties and certifications to the team that will meet your needs and solve your challenges.

HE Track Record

HigherEchelon leadership has successfully implemented and managed sophisticated Salesforce platforms in North America... with multiple business lines, complex integrations and supporting a variety of sales and service processes.

SALESFORCE IMPLEMENTATION SERVICES

Supporting your sales and service processes with today's most advanced and adaptable technology

Common Challenges

Sales, Service and Marketing Processes are difficult to define and adopt

- New programs are time consuming and costly to implement and train
- Packaged sales processes do not account for unique company structure and industry challenges
- Legacy technology does not support the new processes which leads to offline trackers and further disparate information

Data is dispersed within existing systems and offline tracking mechanisms

- Information valuable to sales and service is split across multiple technologies – lead sources, quote systems, ERPs, email, marketing platform
- Sales and Service teams develop offline tracking that is simpler to maintain for an individual, but becomes outdated and impossible to share real time
- These circumstances make it difficult, if not impossible, to obtain a true 360 degree of the customer

Executives hesitant to implement CRM due to high program failure rates

- Failure rates quoted as high as 50% make executives skeptical that a new program will succeed
- Excess focus on the technology solution procurement process itself drives the failure rate higher
- The viewpoint that the CRM implementation is a one time project, as opposed to an ongoing program leads to a short term focus which risks an eventual lack of adoption

HigherEchelon's Proven Method of CRM Implementation



Our Salesforce Implementation Philosophy

Overall System Perspective: Consider future use cases of Salesforce for the organization to minimize potential design conflicts in later system applications. This is a typical issue faced by organizations seeking to implement a single process, only to realize later that this limited their options for future expansion.

Let Salesforce do the Work: Utilize standard functionality where possible in order to leverage code-less custom functionality and future Salesforce enhancements. When custom code seems necessary, collaborate with the customer to gain alignment on the pros and cons before development begins.

One stop shop: Users of Salesforce should have access to all the critical information they need in Salesforce. Develop a comprehensive plan to integrate information to and from other systems.

Collaborative Program Execution: Include key stakeholders in the requirements review, demonstrations and functionality acceptance meetings to increase adoption and overall implementation success rate.

HigherEchelon, Inc. (HE) is a Human and Organizational Performance consulting firm with offerings in software development, process improvement and human capital services to both public and private sector clients. We focus on the intersection of people, process and technology to help organizations overcome their challenges and reach full potential by optimizing their efficiency and effectiveness.