



BOOST YOUR SALESFORCE ADOPTION RATE

SERVICE OFFER:
Salesforce set up for optimal uptake.
(KPI dashboards, automations,...)



"Only 50% of CRM functionality is used by companies that are paying CRM customers." Source: TechnologyAdvice.com

User uptake of Salesforce is the simple act of enabling a user to use the full functionality of Salesforce by creating onboarding, training and continuous development strategies.

ASKLOGIX, a Salesforce partner for 10 years, offers a unique methodology in partnership with the growth agency **PulpMeUp**, for fast Salesforce adoption optimization.

We offer a full audit of your Salesforce usage including recommendations and implementation of Quick Wins to increase adoption of the tool by your team, including:

- Sales pipeline management;
- Provision of Dashboard KPIs to better manage the activity of sales teams;
- Implementation of automated processes such as customer reminders, reminders for sales tasks, etc. for optimising the work of sales staff and partners.

AUDIT PHASE

Our tasks

1. Interviewing users;
2. Analysis of requirements and frustrations;
3. Recommendations for process and tool improvements, e.g. Salesforce and Pardot;
4. Recommendations for a "Growth Marketing" action plan (lead generation).

Deliverable

1. 5-page report on user perception of Salesforce
2. Identification of actions / features for improvement including "Quick Wins".
3. Creation of a mock-up of the target user interface (UX) on Salesforce for increased uptake.

IMPLEMENTATION PHASE

Our tasks

1. Configuration of the recommendations identified during the audit phase;
2. Definition of 3 user paths (day/week/month) for optimising Salesforce productivity;
3. Implementation of automated processes : email alerts, etc.;
4. KPIs reports and Dashboards.

With support from:

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