Dreamforce 2017 Session Notes
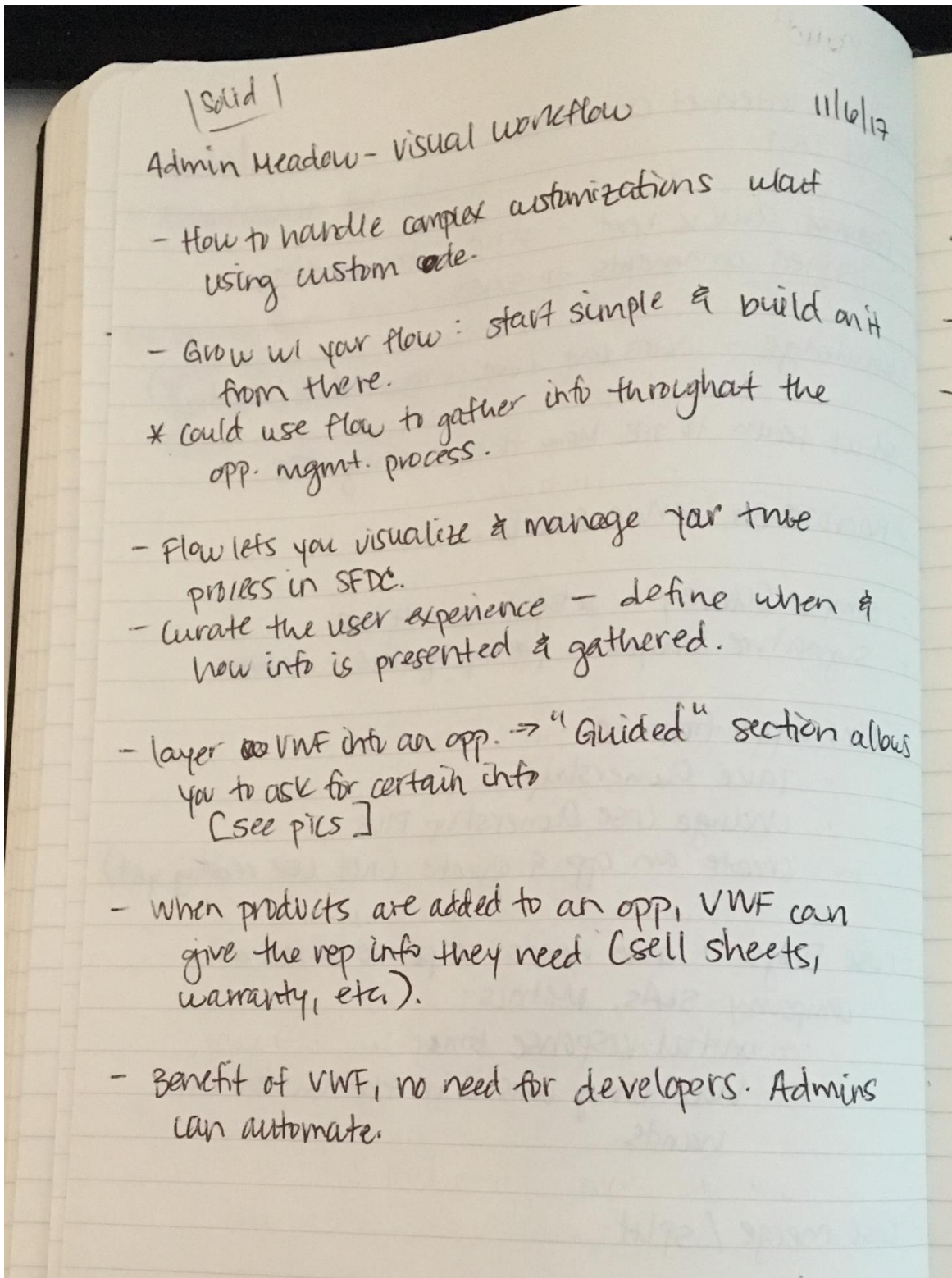
By Stefanie Tial

|Said|

Breakfast w/ Mark Cuban   11/6/17

- Characteristics to look for in an entrepreneur:
  • Culture
  • Vision
  • Ability to execute

* Culture – Knowing where you want to go & connecting w/ your employees to get there.

- Overrated characteristics of people/companies:
  • Amt. of money raised. – doesn't matter. It's not an accomplishment – it's an anchor. You want to hold onto ownership.

- Being nice is underrated. You can show empathy & still be in control.

- Mark looks for people who reduce stress. How can you create calmness & peace? Get work done, stay laid back. These are the people you want to keep. People who are always frazzled create stress & take energy away from you & others → "energy vampires"

- Mark is excited about these technologies:
  • AI → computer learning, comp. vision, machine learning
    ↳ You need to have a fundamental understanding of to be successful in the future.

* Blockchain for social media?
casinos?

On scaling from $10 – $100m. Don't grow your employee count too fast or to impress investors. Otherwise you lose culture, people don't know why they're there & it will all crumble.

|Solid|

11/6/17

Admin Meadow - visual workflow

- How to handle complex customizations w/out
  using custom code.

- Grow w/ your flow: start simple & build on it
  from there.
  * Could use flow to gather info throughout the
    opp. mgmt. process.

- Flow lets you visualize & manage your true
  process in SFDC.
- Curate the user experience — define when &
  how info is presented & gathered.

- layer VWF into an opp. → "Guided" section allows
  you to ask for certain info
      [see pics]

- when products are added to an opp, VWF can
  give the rep info they need (sell sheets,
  warranty, etc.).

- Benefit of VWF, no need for developers. Admins
  can automate.

\ Great \

Admin Meadow - Lightning / Outlook   4/6/17

- Big Win!

- Lightning for Outlook

- Benefits for sales:
    - less time switching btw. apps
    - do work from their inbox
    - create a follow up task
    - quickly find customer contact details
    - attach an email
    - automatic updates
    - more selling time.
    - improved adoption
    - global search avail. in Outlook
    - quick actions from Outlook

- Admin setup
    ↳ search "Outlook" → Outlook Configs
    • Have to set up syncing
    • Set up Publisher Layout for quick actions-
        create a new one - don't use default.
    ↳ Lightning for Outlook
        • use the links w/in setup to download.
* only link the email to 1 record.

- Trailhead module:

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Improve Data Mgmt for SMB   11/7/17
  - Circles of Success

  - Data gap creates real costs for orgs:
      - 20% useless
      - 90% incomplete
      - 21% dead
      - 15% duplicate

  - 4 steps for effective data mgmt
      1. Identify the focus area
      2. Evaluate your data needs
      3. Access, plan, execute
      4. Monitor & maintain

  - Use Schema Builder to visualize your system layout &
    how everything ties together.

  - When making changes to your org, set a metric for
    how you'll measure the changes' impact. Measure &
    document.

  - Documentation - create a Chatter group & upload changes
      - JIRA
      - Guru
      - Project mgmt tools that integrate w/ SFDC.
      - SFDC Support cases.

  - Monitor key data quality metrics using dashboards/
    reports.

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Transforming Revenue Ops   11/7/17

Diana Fritz - Solera   * Salesforce CPQ + Billing
John Banks   session
Sean Joyce
Brian Galdino

- The customer is the center of rev. ops
- Your rev ops teams need to work together:
    • Sales
    • service
    • Finance & ops
- Disconnected processes cause pain for rev. ops
    • want to get to 1 view of your customers:
        - helps w/ customer profitability
        - cross-sell / up-sell
        - consolidated billing
        - product line profitability
        - platform profitability
        - relationship mgmt.

- CPQ + Billing:
    • CRM
    • CPQ   } all in 1 platform
    • Billing

- Kill Excel spreadsheets & minimize manual work

- Solera - lessons learned (see pic)

- Today, silos are fatal — both systems-wise & mindset-wise.

- SFDC Quote to Cash advantage: See pic.

* 606 compliance?

- Payments in SF Billing are applied at the line item level.

check out his book

∥Great∥

Sales Metrics: How to identify the #s that
    Actually Drive Growth   11/7/17
       by Jason Jordan - Partner, Vantage Point
         @ JasonRJordan

- The ability to report data has advanced more rapidly
  than our ability to <u>use</u> that data.

- CRM has created a massive culture of inspection. And, as a
  result, compliance & anxiety. And a false sense of control.

- The key question: How should mgmt use all that data?
- Answer: to <u>improve</u> the data.

- Our guiding question:
  "Can we manage this?"

- 3 levels of metrics:
   1. Business results
      ↳ org. outcomes that can't be managed whatsoever.
   2. Sales objectives
      ↳ objectives that require 'consent' but can be
        influenced.
   3. Sales activities
      ↳ sales & manager activities that can be
        proactively managed.
   * Managing activities is the only thing you can
    control.

- Cause-&-effect → the activities you do lead to
  your sales & business results.

- You can reverse-engineer success.

- Study shows having a clear task is most motivating thing for sales performance, not $.

- Doing more isn't always the answer. Sometimes you have to do things differently.

- Reverse-engineer business results & manage activities

- Drive CRM adoption!
  - Strategy #1:
    - Build CRM around the activity.
  - Strategy #2:
    - Reduce reporting

- Turn your sales managers into superheroes

- www.vantagepointperformance.com/dreamforce

very marketing focused | Great! |

Calling a Truce: Aligning Sales &   4/8/17
Marketing

- Brian Schmid - Cox Automotive
  ↳ Mkting Mgr - Cust Experience

- why do we align?
  • Mkting: Customer driven
    - cust exp.
    - msg. consistency
    - memorability & usefulness
  • 29% higher open rates ⎤ good KPIs for
  • 41% higher click rates ⎦ mkting but sales
                            doesn't care.
  - Poor alignment symptoms:
    • Low Engage adoption & usage
      - not using Engage to send Emails
      - not using templates
    • what to do? Find the sales user who has
         adopted & get them to be the advocate.
  - Mkting's needs are not sales' needs.

- why do we not align?
  • Sales Execs: Revenue Driven
      - bottom line
      - profitability
      - revenue
  • Sales Ops: Process driven
      - lead scoring
      - reliability of data
      - ability to accurately report

- Sales Mgrs: accountability driven
  - task completion
  - individual & territory performance
- Sales floor: performance driven
  - ease of sale
  - easy access to info
  - quality of leads

- How do we align?
  - Data doesn't tell a story, you do.
  - Brand yourself internally w/ sales.
  - Make sure your msg. focuses on each persona's objectives. (see pics)

- Alignment leads to 29% faster close rates.

- Funnel:
  Visitors → Prospects → MQLs → SQLs → Closed won
  ↳ can mkting prove they're accelerating the close prices from SQL to won?

- Rollout Materials to sales:
  - create a rollout program (see pic for details)
  - have a set timeline for rollout of campaign launches to sales. Do this every time. (see pic)

- End results:
  - Engage adoption:
    - Intelligence from micro-campaigns
    - Better targeting & personalization

11/8/17

- Enthusiastic sales team
  - Feedback on messaging
  - ideas for new messaging

How Salesforce uses Service Cloud   11/8/17

- Atul Nanda
- Paul VanMaanen ⟍ SFDC

- Common service delivery goals:
  - Enhance customer ROI via great cust. svc.
  - Deliver at scale, cost-effectively
  - Ability to measure perf.
  - Happy, productive workforce

- 5 key Topics:

1. SLAs & tiered support:
2/ Multiple channels & skills-based routing
3.   • Customer Portal
       • Live Agent chat
       • Communities
       • Social
       • Phone
  * self-service/Portals is rapidly surpassing
    other channels like phone & email.
    ↳ 50x growth over the last 4 yrs at SFDC.
    ↳ 4 key ingredients:
             1. Customer Portal
             2. Communities
             3. Knowledge
             4. Suggested solutions when you
                create a case.
4. Agent Console & Live Agent Chat
       • 360° view of cust.

- Solutions proactively shown to agent
- Case feeds for collaboration
- Case milestones
- CTI integration

5. Einstein analytics to measure performance & drive operational excellence.
   - Reports / Dashboards
     ↳ single source of truth

- Results for SFDC:
  - Customer experience
    - case resolution time down 5%
    - CSAT 9/10 for 39 months in a row
    - <6% of time on phone
  - Service delivery
    - self-service >50%
    - Headcount flat w/ growing # of cases
    - over 2.8m users in Communities

- Disabled email-to-case a couple years ago.
  ↳ Too much back & forth - delayed resolution times.
  - Also doesn't allow for self-service.