



StrategicDataPartners

Salesforce Evaluation Kit

CRM Maturity Model

Effectively managing customer relationships is critical to a business's success, with or without Salesforce. However, you find yourself failing to support your customers from acquisition to retention. Most companies will find themselves at one of four stages in their Salesforce Journey.

Stage 1 – Ad Hoc

Inconsistent Usage.
Administration by end users.
No change control results in further system issues.
Provides little/no business value.

Stage 2 - Limited

Usage increased however still used in an inconsistent manner.
Disjointed Business Processes.
Still a chasm between Sales, Marketing and Ops.

Stage 4 – Strategic

Full end to end automation of business systems.
System controls in place to drive data and system compliance.
Predictable and scheduled functionality improvements.
Mature Dashboards and Reporting for true Business Intelligence.

Stage 3 - Adoption

System is mature and is being used in a consistent manner.
System changes are done in a controlled manner.
Some ad-hoc dashboards & reports.
A few pain points remain around efficiency and Integrations.



Your Challenge

- ✓ We are using old school sales tactics and are in need of a Salesforce instance.
- ✓ We purchased and implemented, to the best of our ability, a Salesforce instance, but it isn't living up to our expectations.
- ✓ We have a Salesforce instance that supports our business processes but need help with management and maintenance.

Your Solution

- ✗ Get out of ad-hoc CRM configuration changes by the minute.
- ✗ Move up the CRM Maturity Model.
- ✗ Develop a robust platform and processes to support it.

Sales Process Map

A step-by-step guide to reach prospects, qualify leads, and close deals

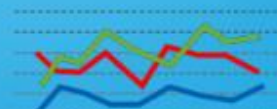
- Plan and Execute Marketing Campaigns**
- Google Search
 - Email Marketing
 - Online Ads
 - Social Ads
 - Partners
 - Content Marketing
 - Events
 - Trade Shows
 - PR



Campaign ROI



Top Search Terms



Leads by Source



Lead Quality

Step 1: Generate More Leads

Plan and execute marketing campaigns that generate demand for your product or service. Capture those leads through a variety of channels including your website.



Plan and Execute Marketing Campaigns

- Google Search
- Email Marketing
- Online Ads
- Social Ads
- Partners
- Content Marketing
- Events
- Trade Shows
- PR



Website Visitors

- Organic web traffic
- AdWords referrals
- Email responses



Web Form

- "Contact me" request
- Free trial
- Event registration



Inbound Calls

- Yellow pages
- Google Maps
- Word-of-mouth referrals



Create New Leads

- Search for the customer in Salesforce
- If one doesn't exist, create a new lead



Organic Views

- Social networks
- Content marketing
- Online communities



Web Form

- New e-book or offer



Marketing Automation

- Set up auto-response emails
 - "Thank you for your interest"
- Lead Scoring
 - Geography
 - Company size
 - Product of interest
- Assignment Rules
 - Lead score
 - Geo
 - Buying stage

Key Metrics



Campaign ROI



Top Search Terms



Leads by Source



Lead Quality

Step 2. Optimize Lead Flow

Create a closed-loop follow-up process so leads don't slip through the cracks.

Establish a lead qualification process to make sure all sales reps use the same consistent methodology.



Key Metrics



Lead by Status



Lead Conversion %



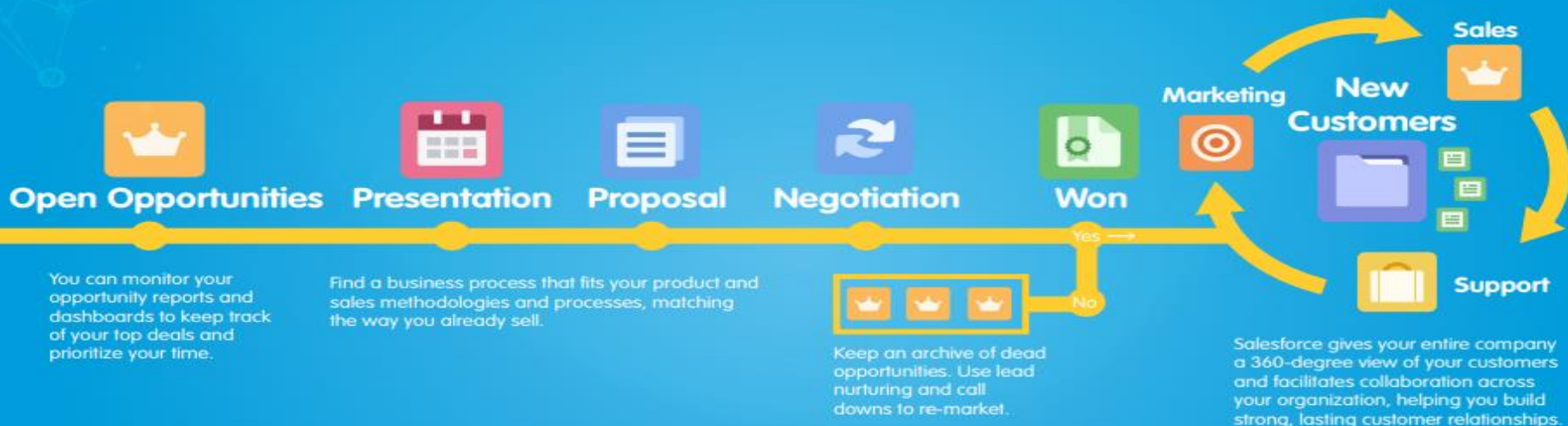
Converted Leads by Month



Top Sales Reps

Step 3. Close More Deals

Close deals faster by providing a single place for updating deal information, tracking opportunity milestones, and recording interactions. Easily analyze your sales pipeline so you can quickly identify and eliminate any bottlenecks in the sales cycle.



Key Metrics



Top 10 Deals



Month-to-Date Trending



Closed Business by Month



Top Sales Reps



Why Success Matters

An optimized Salesforce instance will significantly change productivity across all functional groups in your organization. Successful setup, configuration, and management of Salesforce provides sales enablement that impacts the entire cycle. Let us do what we do best, so you can get back to what you do best.

Strategic Data Partners offers setup, configuration, and management solutions that help small to medium-sized businesses leverage their Salesforce investment to support acquisition to retention.

How We Can Help: Solutions for Every Stage



Setup

Starting from scratch?
We offer setup, standing up a new Salesforce instance customized to fit your needs.



Configuration

Failing to get traction?
We offer configuration, rebuilding the instance to support the sales and success cycle.



Management

Just needing a hand?
We offer management, ensuring all data and processes are automated and up-to-date.

Quickstart Setup

For companies that have yet to implement the Salesforce platform, we recommend our Quickstart setup solution. With this offering, we stand up your instance in 2-4 weeks, configuring it to fit your needs.

Professional Package

- Project Management
- Discovery & Design
- Lead Process Setup
- Opportunity Process Setup
- Training Session
- Up to 5 Reports
- 1 Dashboard
- Data Load of Up to 5,000 Records
- Up to 10 Users
- 2 Week Implementation

Enterprise Package

- All Professional Features +
- Record Type Setup
- Workflow Automation
- Up to 5 Additional Reports
- 1 Additional Dashboard
- Recommended App Exchange Tools
- 10% Off Support Solutions
- Data Load of Up to 10,000 Records
- 3-4 Week Implementation



Support

For companies that have already implemented the Salesforce platform but are not getting any traction or need ongoing maintenance, we recommend configuration or management support. With these offerings, we work with you to optimize your existing Salesforce instance.

5 Hours (per month)

DIY Administration
Occasional Configuration Required

10 Hours (per month)

Best for 1-5 Users
Small Teams & New
Implementations

20 Hours (per month)

Best for 6-14 Users
Larger Teams & Instances

40 Hours (per month)

Best for 15 Users and Up
Full Suite of Administrative
Services



Why Us

Our name says it all. Our team will partner with you to ensure that the data associated with your customer relationships is strategically optimized in your Salesforce instance.

It is central to our business to put our clients' interests above our own, and we live this out by ensuring our solutions allow clients to get the most of their Salesforce investments.

Through exploratory conversations and collaborative workshops, we work with our partners to identify and solve their business problems, even if they aren't directly related to customer relationship management.

We...

- ✓ Identify as a small business who plays a leading role in driving the US economy forward
- ✓ Partner with other small to medium sized businesses who are looking for actionable solutions to business problems, specifically related to Salesforce
- ✓ Offer portable solutions that can be learned quickly at transparent prices

We Are Not...

- ✗ A big three consulting firm with hourly rates at a premium
- ✗ Specialists in hardcore coding and do not create instances that require technical dependency
- ✗ An offshore development chop shop

Don't Take Our Word For It: Hear From Our Customers

InsideOut is a sales innovation lab, delivering on the promise that through innovative ideas and advanced technologies, sales teams will achieve productivity levels never thought possible.

Our Fortune 500 clients require complex sales acceleration technology solutions to test, measure and optimize their sales funnels. At InsideOut, it is essential to work with high caliber players Strategic Data Partners who assist us with everything from identification of key technologies to the implementation into our client's sales stack.

With the countless hours of hard work from Strategic Data Partners, InsideOut has achieved productivity levels for our clients that outpaces the competition.

-Christina Cherry, CEO at InsideOut

Revel Advisors identified a need to find a reliable and dedicated team to help out with the technology sales enablement side of our offerings.

Our client's are primarily startups and move at a very rapid pace. We were working with several individual freelancers that did not fit our needs.

We found Strategic Data Partners to be a reliable partner and a great fit for our culture. The team provides quick turnaround times and acts as badged members of our team. As a seamless extension to our team, Strategic Data Partners combines best practices, speed and quality to enable us to focus on client happiness and growth.

-Michael Bungartz, CEO at Revel Advisors

Let's Get Started! – One Hour Free Salesforce Evaluation

By doing what we do best, we make it possible for you to get back to what you do best. To learn more about how Strategic Data Partners can help you with setup, configuration, and management, contact:

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Visit us at: <https://strategicdatapartners.com/>

Schedule a free one hour consult at <https://calendly.com/chris-dickson/>