

salesforce

THE CUSTOMER SUCCESS PLATFORM

Optimize Your Business Through Automation

Work smarter with Salesforce automation.

Please note: We will be starting a minute or two after the hour to allow for people still joining.

Post your questions in Getting Started before, during and after the webinar!



Your hosts – and some logistics

Who we are...

...and how to stay in touch with us

Presented by:
Your Getting Started Salesforce Community Team



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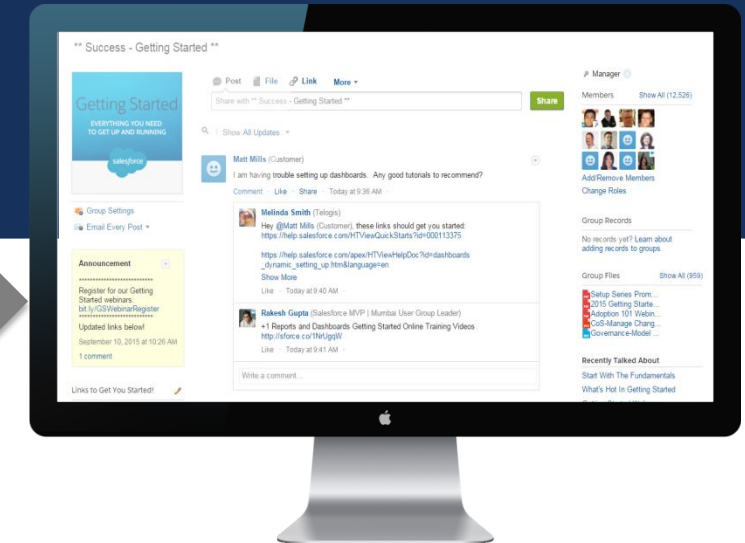
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+ Join



Uwe Gundermann



Martina Curran
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Getting Started Community – a collaboration group with real solutions for maximizing the value you get from Salesforce

Find the group:

<http://www.salesforce.com/success-gettingstarted>

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Poll: How confident are you in automating Salesforce?



Today's success webinar – our objectives



Use automation features to improve and scale business processes in 4 steps

- Analyze your business processes
- Redesign them to take advantage of the automation features in Salesforce
- Implement those features effectively
- Continuously optimize to keep delivering value for your business

What can automation do for you?



Saves time and improves
processes and data



Easy to learn and
implement, big impact



You're not alone!
Many resources and
experts at your fingertips

Setting the Scene: Easy automation with Web-to-Lead

Web-to-Lead Setup

Easily set up a page on your website to capture new leads.

Create a Web-to-Lead Form

Select the fields to include on your Web-to-lead form:

Available Fields

- Salutation
- Title
- Website
- Mobile
- Fax
- Address
- Zip
- Country
- Description

Selected Fields

- First Name
- Last Name
- Email
- Phone
- Company
- City
- State/Province
- Campaign
- Lead Source

NOTE: Would you like to add custom fields to first additional information?

After users submit the Web-to-Lead form, they will be taken to the specified return URL on your website, such as

Return URL

Generate a web-to-lead form

The screenshot shows a web browser window with a registration form. A modal dialog box is open, titled "Save As: LeadCapture.html". The dialog indicates the file is being saved to the "Desktop" in "Rich Text Document" format. The background form contains the following HTML code:

```
<input type="hidden" name="input type="hidden" name="
<-- NOTE: These fields ar
<-- these lines if you wish
<--<input type="hidden" r
<--<input type="hidden" r

<label for="first_name">Fir
type="text" ></p>
<label for="last_name">Last Name</label><input id="last_name" maxlength="80" name="last_name" size="20" type="text" ></p>
<label for="email">Email</label><input id="email" maxlength="80" name="email" size="20" type="text" ></p>
<label for="phone">Phone</label><input id="phone" maxlength="40" name="phone" size="20" type="text" ></p>
<label for="company">Company</label><input id="company" maxlength="40" name="company" size="20" type="text" ></p>
<label for="city">City</label><input id="city" maxlength="40" name="city" size="20" type="text" ></p>
<label for="state">State/Province</label><input id="state" maxlength="20" name="state" size="20" type="text" ></p>
<label for="Campaign_ID">Campaign</label><select id="Campaign_ID" name="Campaign_ID"><option value="">None/</option>
<option value="701F00000004H6UD">Q&C Product Webinar - Jan 7, 2002</option>
<option value="701F00000004H6UD">User Conference - Jan 11-19, 2002</option>
<option value="701F00000004H6UF">DM Campaign to Top Customers - Nov 12-23, 2001</option>
<option value="701F00000004H6UD">International Electrical Engineers Association - Mar 4-May 4, 2002</option>
</select></br>
<label for="lead_source">Lead Source</label><select id="lead_source" name="lead_source"><option value="">None/</option>
<option value="Web">Web</option>
<option value="Phone Inquiry">Phone Inquiry</option>
<option value="Partner Referral">Partner Referral</option>
<option value="Purchased List">Purchased List</option>
<option value="Other">Other</option>
</select></br>
<input type="submit" name="submit">
</form>
```

Save the HTML

The screenshot shows a web browser window with the address bar displaying 'file:///localhost/Users/lcushanick/Desktop/LeadCapture.html'. The page content is a form with the following elements:

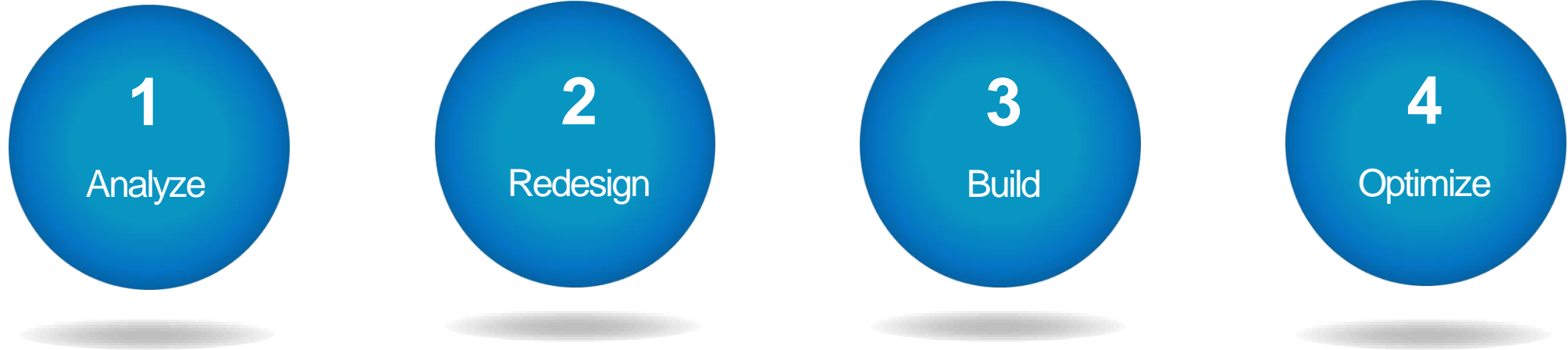
- First Name:
- Last Name:
- Email:
- Phone:
- Company:
- City:
- State/Province:
- Campaign:
- Lead Source:
- Submit:

Publish and capture leads!

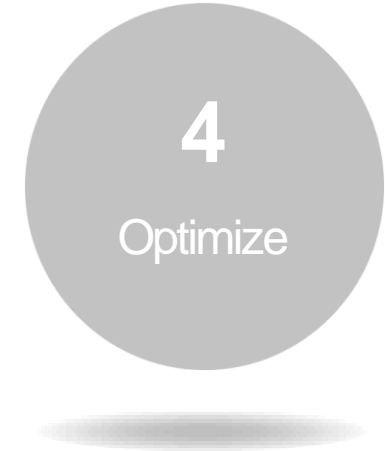
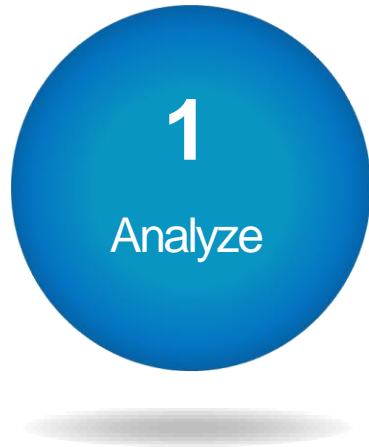
Understanding the value of automation: 3 key benefits



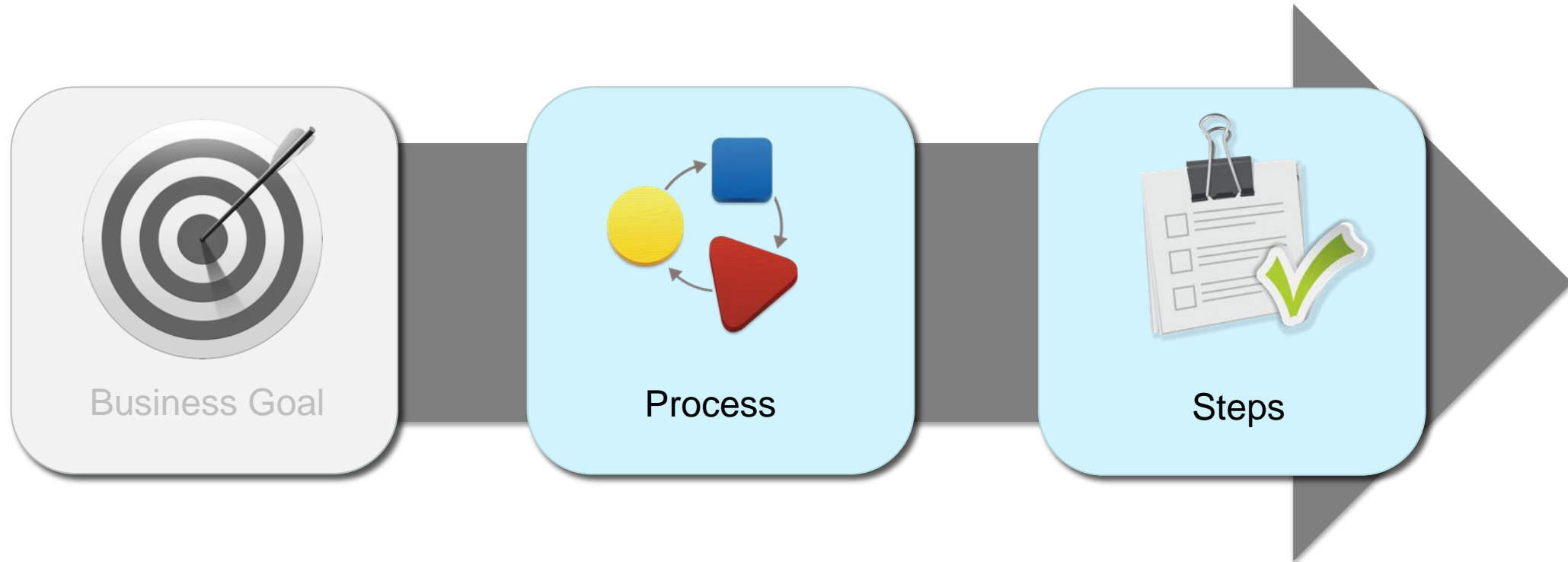
A framework for applying automation to business processes



Where to start: look at your current business processes

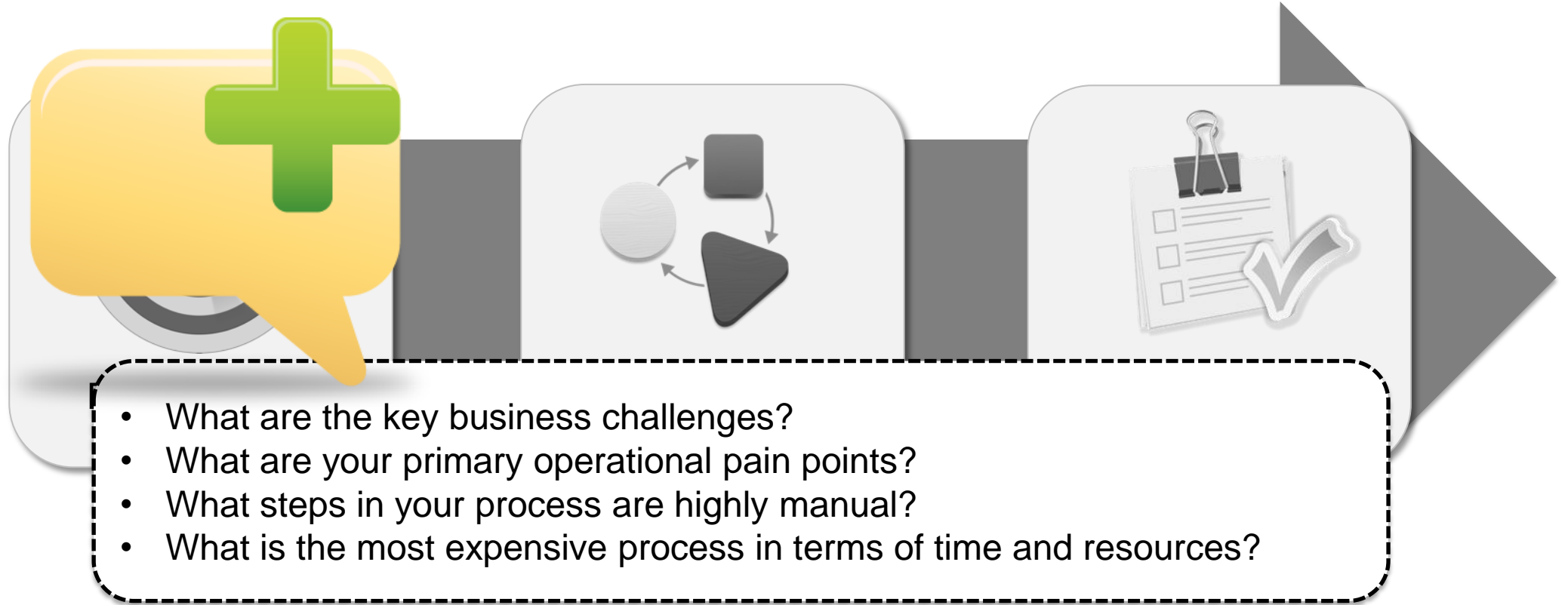


Analyze - map out the process steps



[Resource:](#) Example of a sales process map

Analyze – key questions to ask



Analyze – how to manage



Get business needs in simple,
non-technical language

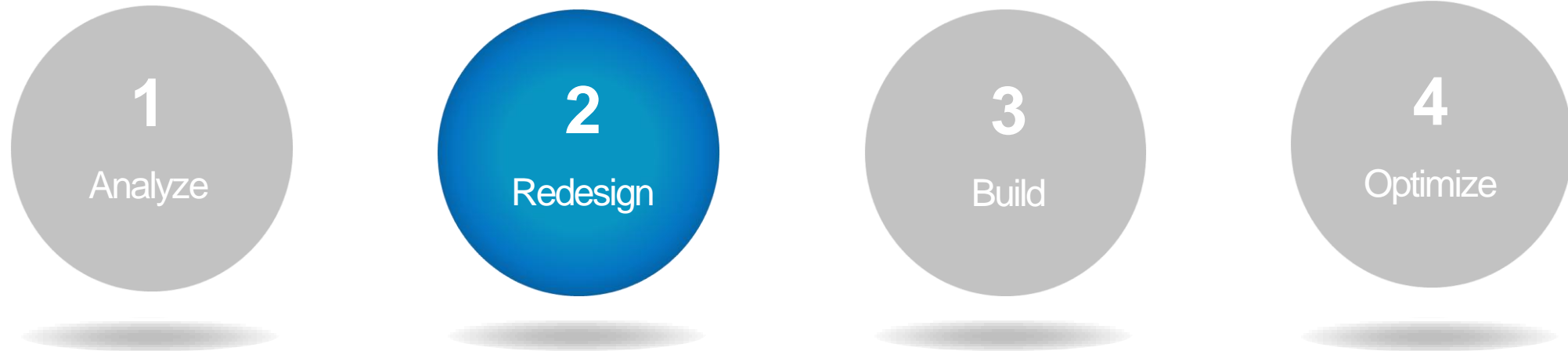


Learn what existing data is
involved, and what new data
you'll need to capture



Envision the analytics at
each step

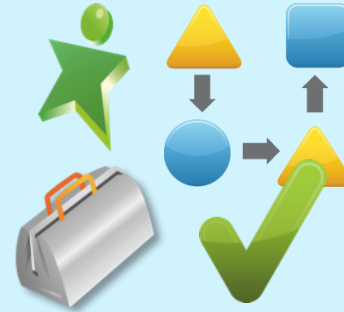
Next: which steps are good candidates for automation?



Redesign – find the right features for your process



Review steps

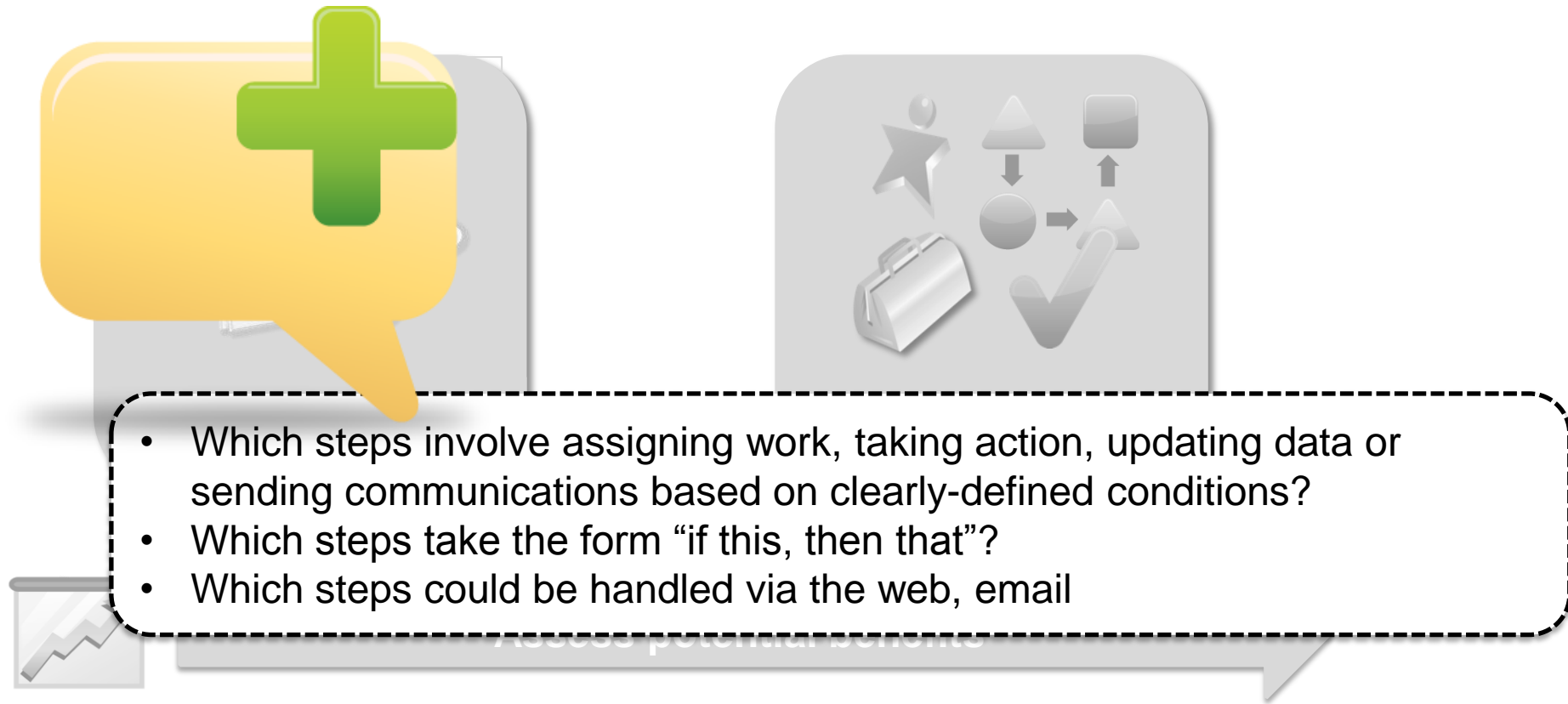


Map to Salesforce
capabilities

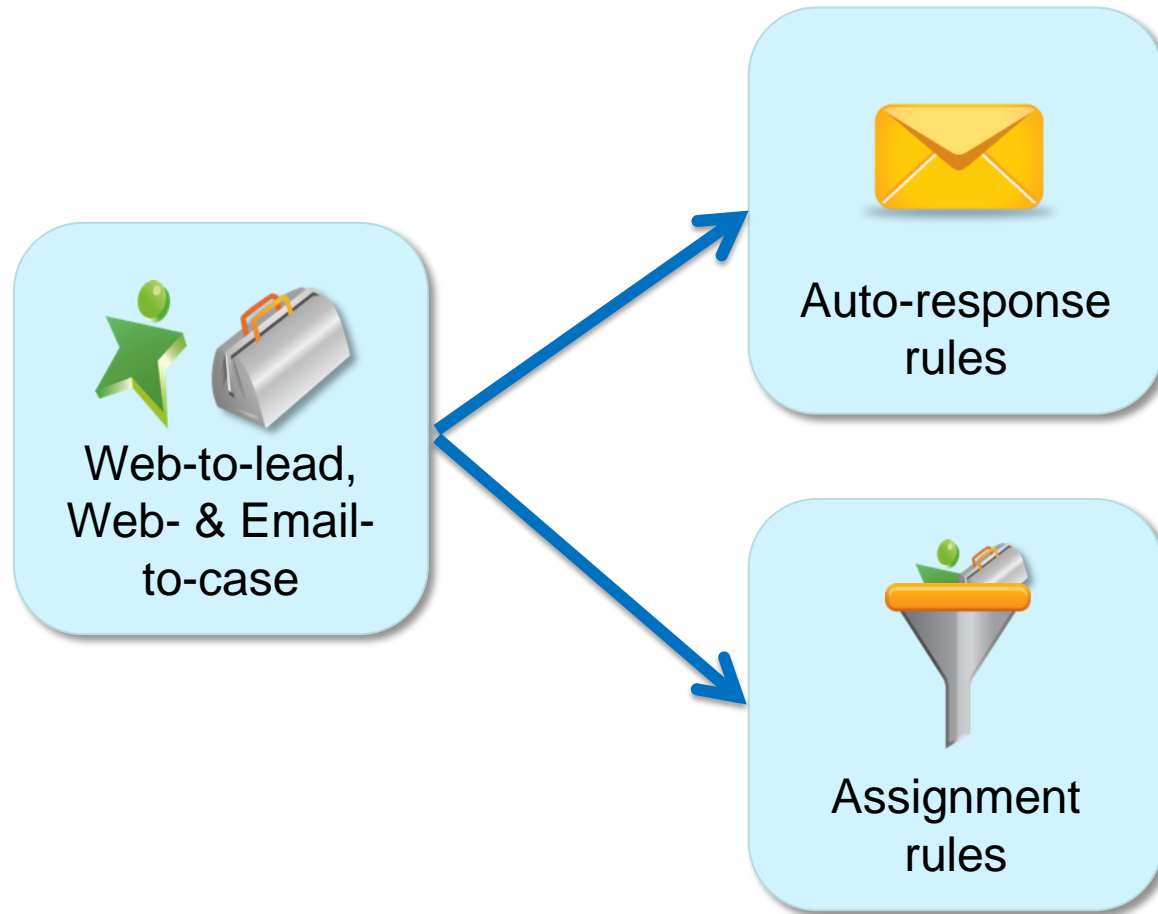


Assess potential benefits

Redesign – find the right features for your process

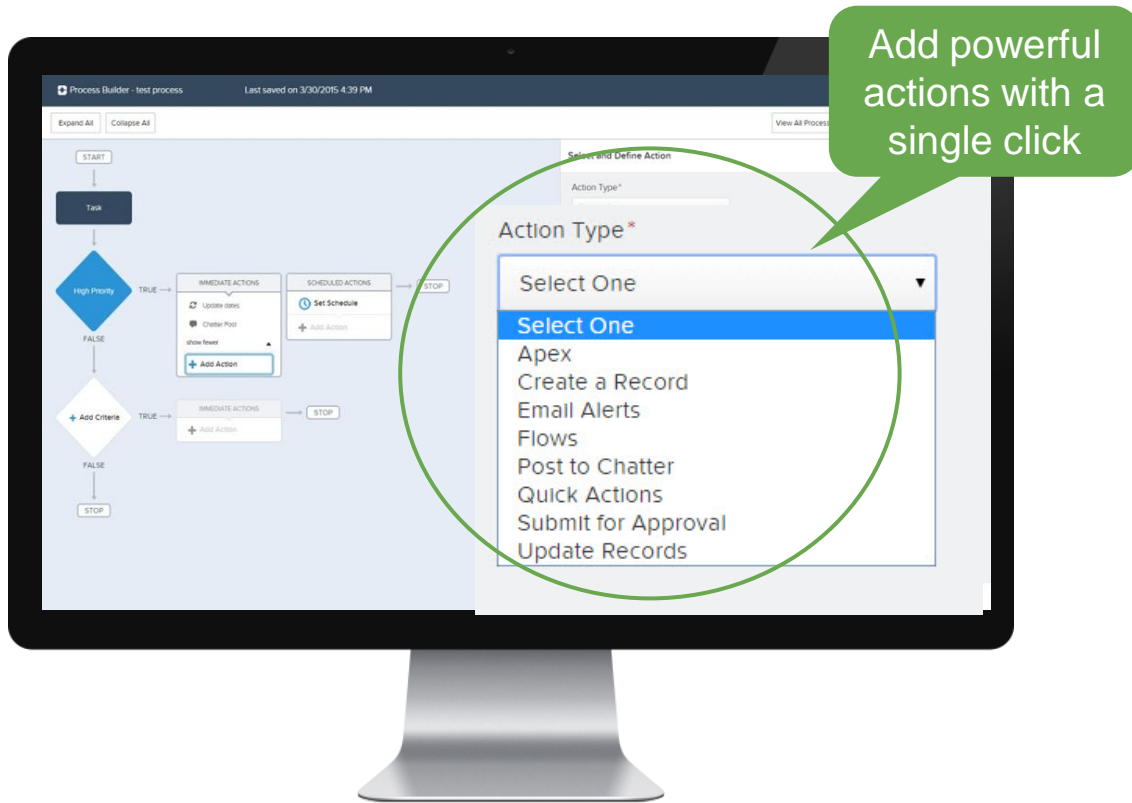


How does Salesforce help you automate?



- Eliminate manual data entry
- Immediately respond to inquiries
- Assign records to people or queues

Process Builder = Next Generation Workflow



Multiple “Rules” in 1 process
More Flexibility
Graphical Interface

Enterprise Edition and above:

- ✓ [Approval Processes](#)
- ✓ [Visual Workflow](#)
- ✓ Traditional Workflow

[Resource](#): [Lightning Process Builder Demo & Tutorial](#)

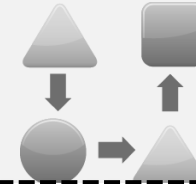
And don't forget:



Web-to-lead
Web- & Email
to-case



ENTERPRISE



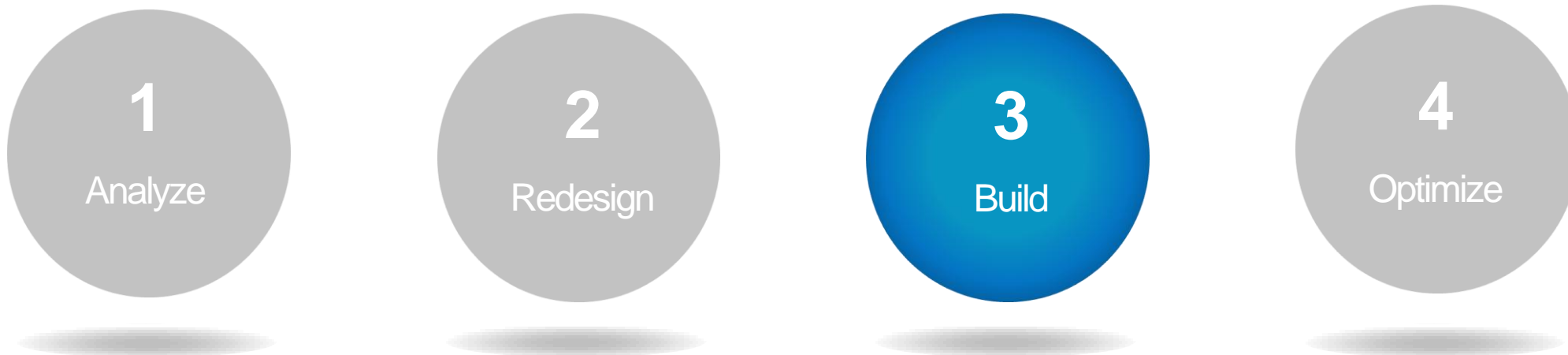
ENTERPRISE



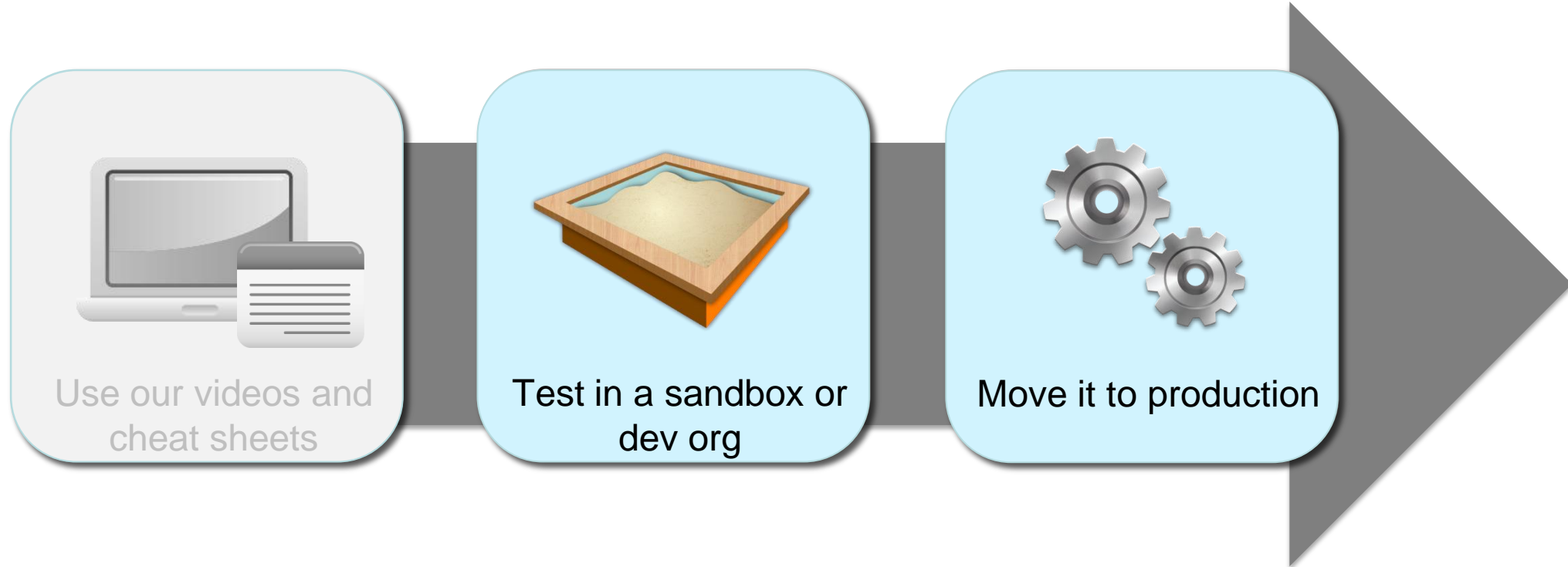
vals

- Custom buttons and links
- Scheduled emails
- Scheduled reports and dashboards

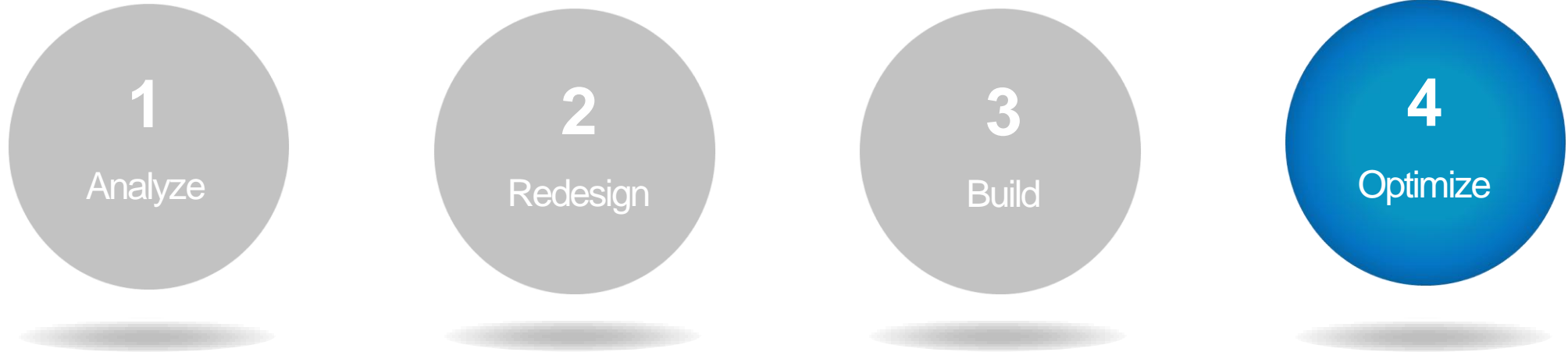
From analysis to action: applying automation features



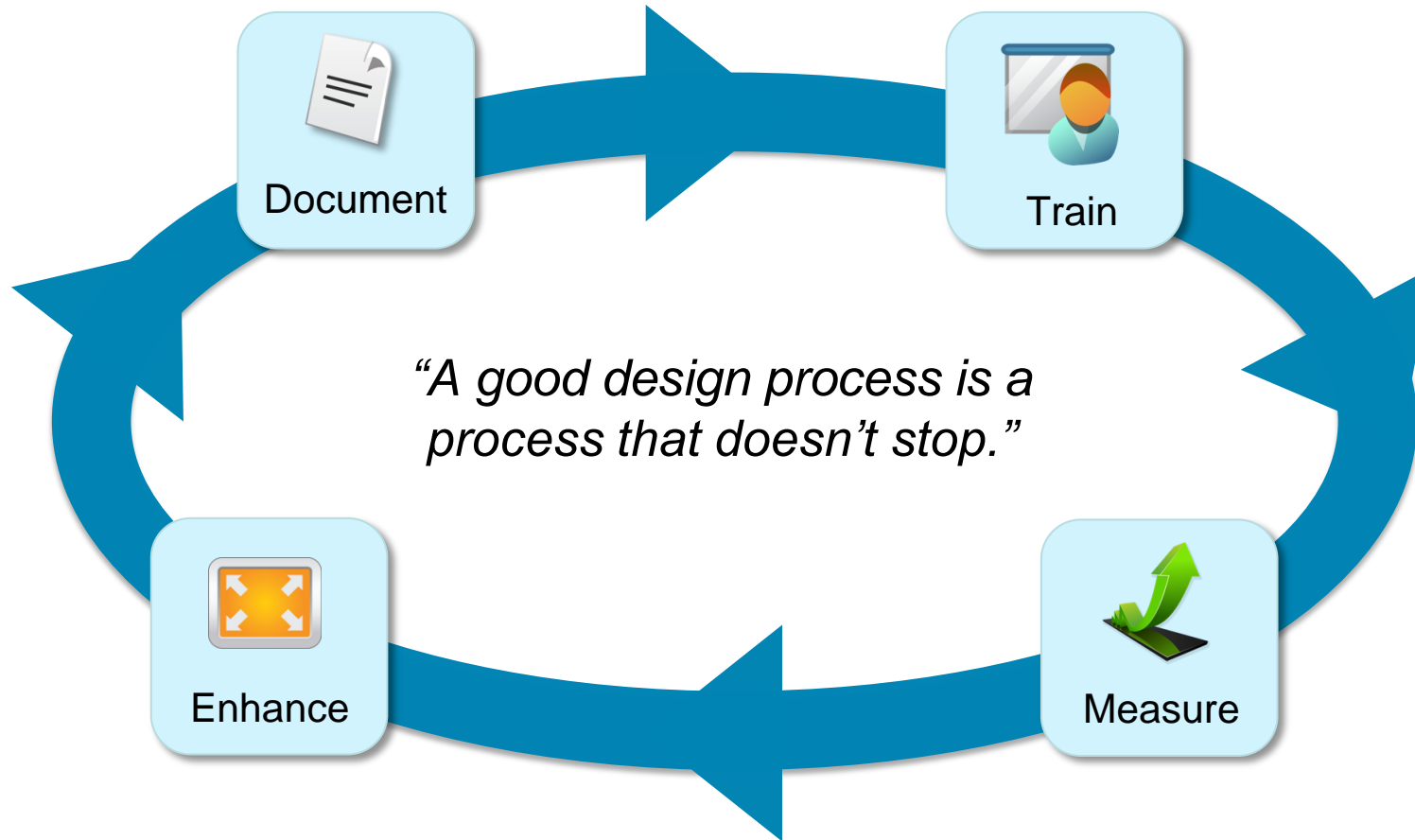
Making automation work: our tips for building



Optimizing: training, measuring and refining



Optimizing – how you make automation really work



[Resource](#): Join the Release Readiness community group

The value of documentation



Keep track of both major and incremental changes using several types of documentation

- Technical
- Logical
- Data dictionary
- User focused

Putting it all together: ideas for automation

For Admins



- Convert emails to you into change request cases via email-to-case
- Capture new user requests in an approval process

For Sales Managers



- Schedule reports to your team ahead of Monday morning deal reviews
- Use time-based workflow to queue up tasks for renewal-based sales

For Marketing Managers



- Schedule mass emails to campaign members
- Use Flow to assign leads evenly across your team

For Service Managers



- Reassign cases when agents are out of office with Transfer Cases permission
- Use Flow to create scripts to guide agents through cases

Demonstration



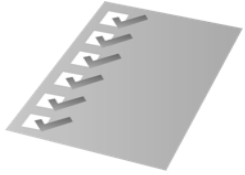
- Web-To-Lead Form
- Formula Fields
- Validation Rules
- Workflow
- Process Builder

What can you do NOW?



- **Today:** pick and implement a simple automation use case
- **This week:** identify and analyze your top 3 business processes
- **This month:** redesign one process using the appropriate automation features

Resources



Essential follow ups from today's session

- See an example of a sales process map
- Learn to capture user stories – ButtonClick Admin advice
- Check out Shell Black's video on assignment rules.
- View these quick videos to learn how to create workflow rules.
- Download the cheatsheets for workflow rules and approval processes.
- Check out our suggestions for useful workflow rules and approval processes.



Background reading, viewing and doing

- Consult our [Lead Management Implementation Guide](#)
- [Compare](#) the different options for automating business processes
- Follow a [guided learning path](#) with interactive tutorials and learn how to use the Process Builder, Visual Workflow, Workflow and Approval Processes.
- Download the [Visual Workflow Getting Started Pack](#) from the AppExchange.



And don't forget!

- Join the [Release Readiness](#) community group.
- View this Dreamforce workshop on [What's Possible With Salesforce Automation](#).

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Reports & Dashboards**



**Get The Most Out Of
Your Data**

**Jump Start Your Mobile
Strategy with Salesforce1**



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Through Automation**

[Register](#)

Wednesdays 7:00am & 1:00pm PDT

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Success Resources 

Achieve More
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- **Demo Videos** for product overviews and implementation how-to's.
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WIN MORE DEALS



REDUCE SALES REP RAMP TIME



INCREASE SALES REP EFFICIENCY



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Questions & Answers



Thank You



THE CUSTOMER SUCCESS PLATFORM