



Go With the Flow Newsletter

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**National Sales
Manager**

Dave Carson

A Message from our National Sales Manager, Dave Carson...

A topic I like to discuss with managers I meet, is what they think is the most valuable asset in their business. I get all kinds of answers, depending on their industry and what state their business is in. Hotel owners often say location, location, location. Managers in IT tend to focus on the new, hot products or their partnerships. Managers from the consulting business mention that their employee's brains are the most valuable. Others emphasize trademarks and brands, dedicated staff, motivated sales teams are also on the list.

The one thing all of these answers have in common is this:

All of these are aimed towards getting more customers. Customers are important to businesses - they pay bills and salaries. So why is it, that customers often say they feel neglected by their suppliers? Customers stop being customers for many reasons. They move to another location, they go out of business, or they go to a competing company. These reasons count for 34% of customer loss. The remaining 66% leave for another reason - they just felt ignored when interacting with some companies. Luckily, we can do something about this.

Our team mainly used spreadsheets for storing customer data even a Rolodex and I kept asking myself why? Spreadsheets get lost, they become outdated, and they might fall into the wrong hands. Business cards are important for collecting customer data. But not when lying on your desk. These customer strategies miss something important - collaboration.

A customer database increases in value when everyone works together on populating it with data.

Salesforce, when used effectively, can be your greatest asset.

1. It allows you to register your leads and contacts.
2. You can track all customer interactions from everyone in your company.
3. It reveals possibilities, making sure no customers are ignored.



Our investment in Salesforce is an assurance that the customer is at the heart of our business.

The next issue of our newsletter will feature a "Jeopardy" Game with a Grand prize



Messages from the I.T. Team
Stacey
Linda
Miles

Our Salesforce Motto:
No One Left Behind

For those of you who may not be up-to-date with learning Salesforce, our team is committed to no one being left behind - please reach out to us - we are here to help

Motto

If it's not in *Salesforce*, it doesn't exist!





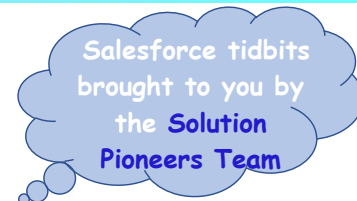
SALESFORCE...IT'S EASY

and some life wisdom lessons as well!

Contributed by...Chris Lopes

Some numbers to consider...

Salesforce is one of the largest valued cloud computing companies in the world with revenues of 90 billion dollars per year. Just to give you an idea of scale, that would equal 3,000 BPE's. In fact, the entire Ingersoll Rand corporation has a revenue of 13.3 billion dollars; so, Salesforce is just about seven times the size of them. They bring in the same amount of money each year as the United Arab Emirates and more than Portugal, Israel and Ireland. If they were a country they would be 30th largest on the planet by revenue. But they aren't a country. They don't build roads or airports or even pumps and compressors. They make a cloud-based software that is SO good at what it's designed to do that over 80% of Fortune 500 companies use it to manage their customers. Not good enough for you? "But will it make my job harder?" Salesforce is on Fortune Magazine's "100 Best Companies to Work For in 2017" list - they are number one on the list. Those people must love their jobs, I wonder what CRM they use...



- Solution Pioneers & Salesforce Teams**
- | | |
|------------------|--------------------|
| Caitlyn Allgaier | Jonathan Dearborne |
| Jennifer Harriss | Kyle Kalinowski |
| Kathy Kelsey | Matt Liuzzo |
| Chris Lopes | Hannah Schlett |
| Stacey Smart | Linda Kronberg |
| Miles Johnson | |

So why? Why is it so successful? The reason is because it's easy. It may not seem easy to you right now but it will. In a few months you will look back at TDF and your spreadsheets and wonder how you ever put up with that system. Salesforce isn't a watchdog to make sure that we are doing our jobs, and it's not a database for us to type all of our phone calls and appointments into. It's an assistant - Your Assistant. When you use it all day every day, it will predict what you will and should do next. It will suggest new methods and strategies which will improve your sales process. It will tell you when you should start (and STOP!) spending time on certain customers and projects. It will make recommendations on who you should call today and who you should visit next week. Most importantly, it will make your job simpler. Salesforce isn't for management to micromanage us. It's for us - so we can better manage ourselves day to day. No more wasting time answering questions about where a project is in the pipeline or compiling a list of your targets for a certain manufacturer. It's all right there. And while we don't have to worry about that part of our job anymore, Salesforce will be showing us how to improve our day to day activities so that we can grow our territories quicker and more efficiently. Your own personal assistant.

Story Time...

My wife, Kristin, loves to go to the gym. She is very interested in fitness and has been for as long as I have known her. For years I have wondered (and failed to understand) how someone could find the motivation to wake up at 5:00 AM and go through a brutal workout for an hour before the kids wake up and before going to work. Seemed terrible to me. I once went into a gym because my roommate in college forgot his key and needed me to bring it to him - it was terrible. Other than that, I have never stepped foot in a gym (never mind actually worked out).

Last November, Kristin found a new gym to go to and let me tell you, it is VERY expensive. They have one hour classes and measure your heartrate while a trainer tries to kill you. Sounds like fun right? Well after a couple of months I finally told Kristin that she has to quit this gym. It's way too expensive and I see ads for \$10 per month at other gyms all the time. Kristin gave me an out - she said she would quit this gym; but first I would have to go to three classes myself. Of course, I said no way, so she kept going and we kept paying for another couple of months.

Finally, I had enough of seeing this large sum of money being automatically withdrawn from our checking account. I said "fine, sign me up for three classes then you have to quit".

Let me tell you friends, I was not prepared. I went to the first class and I thought for sure I was going to die; and as far as I know, I almost did. The next day I could barely stand up. It hurt. The day after that I felt much better though, so I thought "ok one down two to go". For the second class, I was more prepared than the first. I moved faster, lifted heavier weights, and in some sick way, I ALMOST liked it. I was sore but not as much as the first time. I actually looked forward to the third class, in a twisted way which didn't make sense to me at the time. I could finally see why Kristin did this and I secretly thought to myself that I understood why it was worth the money to her. My third class I was stronger and faster than I can remember being since I was 20 years old (still not particularly strong or fast, but more than in recent memory!). The movements, weights, machinery, all became exciting and familiar. It hurt like hell but I could see positive improvement immediately not only in my body but also in my confidence and attitude in general. What do you think happened next? I signed up for the damn expensive gym and now I happily pay double what we were paying before. I go to the gym three times per week before the kids wake up(!) and I actually love it because I see the results.

The point here is that the process reminded me of implementing Salesforce at work. It's hard, it hurts and even though I know that thousands of other people swear by it, and I know it's the right thing to do professionally, the up-front "cost" seems hard to justify. The fact is that after using Salesforce for a couple of months and integrating it into our everyday routines we will work more efficiently, we will be more accomplished at the end of each day, and we will see legitimate tangible results - higher sales! It's worth it. I know it and you do too. The hardest part is getting started but every day it will become easier until it is part of your normal routine.



Communication tools...



Salesforce offers an incredible number of tools, which BPE will be utilizing. These tools are designed to facilitate improved communications both internally and with customers.



Salesforce Chatter is a private social network connecting BPE employees with each other via instant messaging and is used to communicate professional, business-related activities.

It is easy to create Chatter groups for each department, sales group, etc. and groups can include non-BPE employees or BPE employees who may not yet be using Salesforce.

BE PRODUCTIVE

Work smarter, not harder.

- Join relevant Chatter groups—you'll be more informed and engaged than ever.
- Share what you're working on—you never know who may have a tip or insight.
- Bring meetings online—save time and enable everyone to follow the conversation, even afterward.
- Share what you know—you never know who may be looking for your expertise.

WORK BETTER AS A TEAM

Two (or 10) heads are better than one.

- Create a group for your team—see where you can help, and be helped, every day.
- Share a draft—multiple viewpoints save time and always create a better product.
- Read your feed to stay in the know—learn new things and anticipate their impact.
- Praise coworkers—create a culture of achievement and increase engagement.

MAKE YOUR IDEAS HEARD

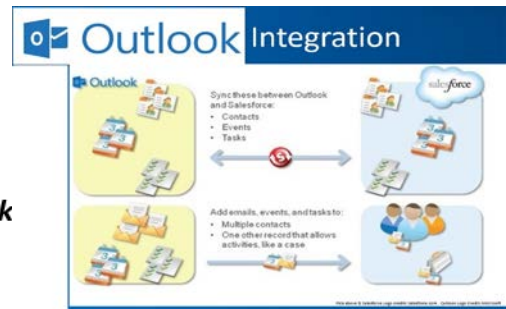
Shape the future of your company—and the world!

- Create a feedback group—connect product teams with insights from the field.
- Put up a poll—gather feedback and guide the future of your products and organization.
- Follow your interests—find a group to discuss events and subjects you enjoy, you never know how valuable it might be.
- Share your expertise and knowledge of the market—become known as the expert you are.

Salesforce for Outlook is a powerful integration application that lets you add emails to Salesforce from Outlook in a single click and it syncs contacts, events, and tasks seamlessly in the background.



Salesforce for Outlook



GET IT ON THE APPLE STORE



GET IT ON GOOGLE PLAY

The *Salesforce Mobile App* is an enterprise-class mobile app that provides instant access to BPE's CRM data from a phone or tablet.

- ➔ The mobile app is included with every Salesforce license.
- ➔ The app is plug-and-play
- ➔ The app is cross platform (Android and iOS)



If it's not in *Salesforce*, it doesn't exist!

