



Go With the Flow Newsletter

Inside this issue:

- ✓ Salesforce Badges
- ✓ No One Left Behind
- ✓ Salesforce Jeopardy Contest

Contents: *Message from the Editor* *Salesforce Tidbits*

A Message from the Editor-in-Chief, Linda Kronberg



***Editor-in-Chief
Linda Kronberg***

Our Salesforce soft launch is moving forward. Everyone is continuing to learn the system and to utilize it's capabilities. We currently have Users at several different levels of usage and our goal is to get everyone to the same level of knowledge and usage before our hard launch.

Manufacturing Sales is one of Burt Process Equipment's most complex business areas. Kudos to Ed Simpson and his group for the outstanding job they have been doing in embracing everything Salesforce has to offer!

During this initial phase, we have begun to develop Salesforce FAQs (Frequently Asked Questions), which we will distribute as soon as we have completed a first pass.

We would like to thank everyone for their patience relative to Salesforce for Outlook, which is a highly-rated Salesforce add-in that allows us to easily sync data between Salesforce and Outlook. We had anticipated a smooth transition to Salesforce for Outlook but we have had a couple of hiccups along the way. We assure you that one of our top priorities is to get everyone up-and-running on Salesforce for Outlook and we are working directly with Salesforce to implement a solution for all Users who are currently experiencing issues.

We hope you enjoy reading this newsletter - keep an eye out for a survey about the newsletter, which we will be sending out next week. We also want you to have some fun so this week's newsletter includes a Salesforce Jeopardy contest with some nice prizes as well as information as to how you can give out Salesforce badges. Enjoy!

Salesforce Badges

Use Salesforce Badges to thank someone if they've done a great job or to recognize an achievement



Thanks posts appear in your feed and the feed of the person you're thanking.

The badge will appear publicly on the Recognition tab of the recipient's profile.

1. From the Chatter publisher, click **Thanks**.
If **Thanks** isn't displayed, click **More** and select **Thanks** from the publisher's drop-down menu.
2. Type the name of the person you want to thank.
Currently, you can only thank one person at a time, but you can mention other people in your post's message.
3. Select **Change Badge** to select a different badge for your post or keep the default badge. You can choose from twelve pre-defined badges. Select the badge image to see more information about the badge.
4. Type a message for the person you're thanking.
5. Select your audience.
 - >**My Followers** to post to all your followers
 - >**A Group** to post to a specific group. Search for the group and select the group from the list. The person you're thanking is @mentioned at the beginning of the post's message. When you post to a private group, only the group's members can see your post to the group. However, the badge will also appear publicly on the Recognition tab of the recipient's profile.
6. Click **Share**.

Motto

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





Keeping Up With Technology

and How Salesforce will Help

Contributed by...Miles Johnson

At your service...

The 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**

One thing is certain when it comes to technology in the world today...technology will not wait for us, we must keep up with technology. But, not only must we keep up, we must also use it correctly and in the best way possible as a company. Otherwise, we risk falling behind our competitors' technology, becoming irrelevant to some customers due to a lack of technology, or suffering missed opportunities. Fortunately, Salesforce can help with all of this.

We will be able to better streamline processes with the technological innovation that Salesforce provides, along with being able to reduce paper files. Communication will become much more efficient and easier to follow. Queues will be in place to have a pool for which the appropriate work can be handled and distributed correctly. Tasks can be assigned to the right people and priorities can be made within Salesforce so we all know what needs to get done and when.

The ability to log a call through the technology Salesforce provides allows us to be much more organized as a company. No more cluttered papers across the desk with no need for note taking, as we can jot down all the information we receive from every customer directly into Salesforce. This might take some time to get used to, but it will prove to be much more organized and way less messy than the old way of writing everything into a notepad.

**TECHNOLOGY IS USED
EVERY DAY
IN EVERY FIELD
IN EVERYTHING WE DO!**

We cannot resist progress but instead need to keep up, as well as, embrace technology. Salesforce can play a key role in allowing us to do so. As we each allow ourselves to become more functional with it the impact will become quite visible in our productivity, our growth, and in our success.

Salesforce can always improve for us as well, as we have initiated a Salesforce enhancement list that requests can be added onto by Stacey, Linda, or myself.

Motto

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





So what does “no one left behind” mean, and why is it important?

Contributed by...Stacey Smart



What does “no one left behind” mean?

In history and in the American Military there are many references to “no man left behind”.

The U.S. Armed Forces – “I will never leave a fallen comrade”.

“The oath to never leave a fallen comrade is a promise made to each other, that even if we die, our brothers in arms will do everything they can to bring us home. It’s a mission that hasn’t ended, and as long as wars continue, it never will.” We have borrowed from this as we know that someone will struggle as they learn and adapt to new technology.

What does “no one left behind” mean in context of Salesforce and BPE?

Burt Process Equipment has identified its values as:

- People
- Quality of Life
- Stability

BPE is committed to people, to you and to providing a stable company focused on growth. BPE Senior Leadership has invested in Salesforce and you. In order to be successful with this endeavor, we must make a concerted effort to identify and work with all of BPE staff to ensure the success of all. The pledge to leave no one behind is embedded within the BPE IT Department and to make sure that no one is left behind in learning, understanding and being able to use Salesforce.

It’s about giving attention to all, including those who are furthest behind, and needing one on one instruction. We are aware that we have end-users who are very experienced with technology and those who are not. We understand that in order to have a successful implementation that we must be intent on providing training that meets all skill levels.

Our Motto...
Your Motto...
Everyone's Motto...

“If it’s not in *Salesforce*, it doesn’t exist.”

Why is the emphasis on leaving no one behind significant?

It’s significant because we are heavily invested in Salesforce and committed to our main motto, *“If it is not in Salesforce, it does not exist”*; for this to be our motto, we must assure that all of our end users are fully trained and are using Salesforce for all of their leads, opportunities, activities and their sales.

As a business, we believe that Salesforce is the best way to improve and reach our business goals. Everyone has a role to play in implementing these goals; ours is have training material available to you and to provide you with assistance, yours is to commit to learning Salesforce and doing the assignments that are provided to you and to ask questions and ask for assistance if needed.

What does success look like?

It means that all of our sales people; Inside, Outside, Manufacturing, Tools Sales reps along with Customer Service are using Salesforce for their daily work. We know that on average companies that use Salesforce will have;

- +27% increase in sales revenues**
- +32% increase in lead conversion**
- +34% increase in customer satisfaction**

What to do to make sure no one is left behind?

Everyone has a role to play in implementing these goals; ours (BPE IT) is to have training material available to you and to provide you with assistance when needed. Yours is to commit to learning Salesforce, doing the assignments that are provided to you, to ask questions, and request assistance when needed.

You need to communicate with your Solution Pioneer Representative, Manager and IT on both your successes and your struggles with Salesforce.

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



Entry Deadline
June 14th - 5 p.m.



Entry Deadline
June 14th - 5 p.m.

ENTER TO WIN

Enter at: <https://www.surveymonkey.com/r/LQWN9M2>

SALESFORCE FOR BPE	SALESFORCE FUNCTIONALITY	SALESFORCE MISCELLANEOUS
Answer 1: If it's not in Salesforce, it does not exist.	Answer 1: Sections of this Salesforce Tab include a Dashboard, a Tasks section and an Events/Calendar section	Answer 1: The acronym for this three-word term is CRM
Answer 2: This is the group of your peers who have been selected to represent each department as we move forth with the Salesforce Implementation	Answer 2: This section of the Salesforce screen takes up the left-margin on most Salesforce screens and contains the following sections: Create New, Recent Items, etc.	Answer 2: This is a group of Users who are responsible for monitoring Cases created from the Salesforce email-to-case process and include the following for BPE: Territory – New England, Inside Sales, etc.
Answer 3: This is a private social network connecting BPE employees with each other via instant messaging and is used to communicate professional, business-related activities	Answer 3: The purpose of this Salesforce tool is to provide a snapshot of the business visually via charts, gauges, tables, etc. and provides the capability of drilling down to the source data/report	Answer 3: This is a Salesforce add-in, which is used to generate Quotes in an Opportunity. <i>[Hint: has the same name as a popular dance at most wedding receptions]</i>

Entry deadline: June 14th - 5 p.m.



TWO PRIZES WILL BE ISSUED

Prize 1: \$10 DD Gift Card and a Salesforce thermal mug

Current Salesforce Users who correctly answer all 9 questions will be entered into a drawing for Prize 1.



Prize 2: \$10 DD Gift Card and Shari's Gourmet Chocolates

Non-Salesforce Users who submit an entry will be entered into a drawing for Prize 2. Answers should be submitted but can be incorrect.

CONTEST RULES

You can't win if you don't play....

- >Contest is open to all BPE employees
- >All responses are in the form of a question
- >There are two prizes - see Prize notes.
- >**One winner of Prize 1** will be randomly selected from **ALL** contest entries submitted by current Salesforce Users who submit correct responses
- >**One winner of Prize 2** will be randomly selected from **ALL** contest entries submitted by non-Salesforce Users who submit an entry
- >Correct contest answers will be published in the next newsletter
- >**Entry deadline is June 14th at 5 p.m.**



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

