



Go With the Flow Newsletter

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**Editor-in-Chief
Linda Kronberg**

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

The Salesforce soft launch is now in full swing. Everyone is working diligently on their Salesforce activities and our Salesforce Activity Contest has ended with Matt Liuzzo as the Grand Prize Winner. Everyone did an exceptional job meeting the goals of the contest and many Salesforce Users surely had a competitive spirit in using everything that Salesforce has to offer.

We are also receiving a lot of positive feedback about how much everyone is enjoying working with Salesforce and how much Salesforce has to offer. We have included a section in this newsletter highlighting some of the great feedback we have received. And, the best thing of all, is that everyone is sharing tips, tricks and how-to's within their departments and throughout the organization.

Stacey, Miles and I are so excited about the progress everyone is making and we are always available if you have any questions. The purpose of this newsletter is to provide a forum for communicating useful Salesforce-related information and we encourage everyone to submit material for inclusion in the newsletter. For example, the last newsletter included some great guidelines for Salesforce Opportunities from Kimball Putnam.

Although there are no official Salesforce contests this week, please be aware that we will have a Salesforce challenge and a prize in the *next* newsletter (Issue 9), which will require you to read the newsletter in full to uncover clues...so, please so keep reading our newsletters!

Salesforce Activity Contest Results

**Congratulations to Matt Liuzzo,
Grand Prize winner of the
Salesforce Activity Contest!**



Matt is pictured here with the Fourth of July-themed gift package which he won.

**The top performers of each group are listed below;
Matt's name was randomly drawn by Ryan Griffin as
the winner from this group:**

Support: Julie Nazario
Customer Service: Kristin Scott
Inside Sales/Open Territory: Jennifer Harriss
Outside Sales – New England: Chris Lopes
Outside Sales – MidAtlantic: Brian Mahony
Technical: Matt Liuzzo



*Thanks to everyone for doing an
outstanding job creating activities and
working in Salesforce during the two-
week period in which the contest ran!*

Motto

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





Delivering Great Customer Service

Contributed by...Hannah Schlett

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

Great customer service is one of the fundamentals in having a successful company. For years Burt Process has been finding ways to always provide exceptional customer service. Salesforce is going to make our job at providing great service that much easier! Salesforce will help with follow ups and overall communication, both internally and with our customers.

Remembering to follow up with a customer can be challenging. I know a few people who have notebooks filled with customer names and numbers along with dates to follow up. This way of keeping track of things is now in the past. With the salesforce task feature you can pick a specific date, time and set a reminder for yourself to follow up. Tasks can have as much information as you'd like in the comments section. It also has a 'related to' section where you can choose a specific contact within the company. This feature will make your day-to-day follow ups a breeze. Creating tasks for yourself will assure on time customer service and make sure no customer is overlooked!

Burt Process has over 20,000 accounts set up in P21. With that many customers, it can be difficult to remember detailed information and make each customer feel special. Salesforce gives us the ability to write notes on the accounts, cases, leads, calls, etc. which are 100% internal. This means if we want to remember something specific about our customer we can simply jot a note and next time they call we can make them feel remembered which helps in developing them into a loyal customer. This feature will also help us internally, knowing where one person left off with an account and where we will need to pick up as well as conversation history. It's an easy way to look up conversations to help better understand past problems. Creating notes on accounts will help us gather information and give us background information on each customer even if it's our first conversation. Everyone likes feeling important enough to be remembered!

Between our customer service, technical support, inside sales, outside sales, manufacturing sales, engineering, and field service departments there are bound to be duplicated questions. Salesforce solutions will make the common questions at Burt a one stop shop. Putting customers on hold to call another department with a question they already answered 5 times that day will no longer be necessary. The solutions feature is an easy to use search engine similar to google. You simply type in a key word and a list drops down with articles pertaining to it. This will not only speed up our customer service, it will also stop the repetitive questions each department is faced with.

There's no doubt salesforce will increase the great customer service provided here at Burt Process! Tasks, notes and solution features are just a few of the many ways salesforce will not only assist our internal communication but will also reach the customer service level and assure happy customers!



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



Great Things We Are Hearing About Salesforce

"Salesforce is great! I love that a majority of us are adding email trails and logging calls to customer accounts. Very beneficial! Very easy to navigate as well!"

Kristin Scott
Customer Relations-International Specialist

"Even as a naturally organized person, I have found that staying organized is even easier with Salesforce."

Kyle Kalinowski
Sales Engineer

"Now that I have started to use Salesforce on a daily basis, I am finding that it is meeting the Hype about being a powerful tool that gives me access to all of the data and information that I need to do my job, all in one place. I am starting to see my team members using it more and more effectively and realizing for themselves, the tremendous advantages and organizational benefits. This is a whole new way for Burt Process to manage sales and success. Can't wait 'til we go LIVE and take full advantage!"

Kimball Putnam
NE Regional Manager

Key Benefits of Salesforce

- Customer Information
- Account Planning
- Time Management
- Team Collaboration
- Accessibility





New Salesforce Chatter Group Created



BPE SF Users

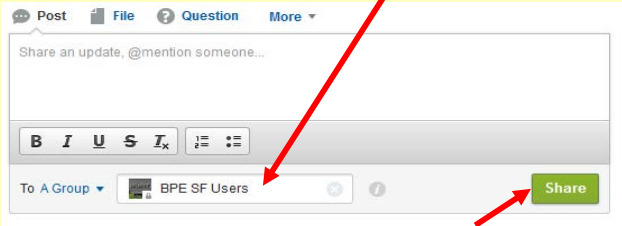
A Group has been created in Salesforce called "BPE SF Users". This Group consists of all current, active Salesforce Users. We will keep this group updated with changes to the list of Salesforce Users. The Group is marked Private but anyone in the group can post to the group. Messages sent to the group will immediately be visible to all Salesforce Users.

How to Send Group Messages in Salesforce

Step 1: Select "Post" and then click on "My Followers" – a box will pop up below the message box and you can click on "A Group"



Step 2: Click in the blank box that pops up and click on the Group name to select it (i.e. BPE SF Users)



Step 3: You can now type your message and then click the "Share" button to send your message to ALL BPE

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