



Go With the Flow Newsletter

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

Inside this issue:

- ✓ BPE - Social Media
- ✓ Salesforce Go! button



**Editor-in-Chief
Linda Kronberg**

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

It's hard to believe that summer is winding down. But, just as summer is winding down, Salesforce usage is skyrocketing! Our Salesforce Soft Launch is fully up-and-running and we have every Salesforce User working diligently within Salesforce logging calls and tasks and creating Cases, Leads and Opportunities.

The Salesforce "hard launch" will soon be upon us. In the meantime, there are several other exciting IT changes happening at Burt Process Equipment this year. Some server updates were recently made seamlessly "behind the scenes",

several of our outside sales reps have begun using Dell 2-in-1 laptops and more of these laptops will be rolled out to other users later this year, we are currently in the process of testing the latest version of P21, which we will be upgrading to this month, and we will be upgrading everyone to Office 365, which will allow all Salesforce Users to fully utilize Salesforce for Outlook, which only half of our Salesforce Users currently have, and also eliminate some of the Outlook issues users have been experiencing (e.g. setting out-of-office message, seeing room availability, etc.). Special thanks go to the Senior Management Team and Stacey Smart for committing to keeping us up-to-speed with the ever-changing world of computer technology!

The information age has come a long way since the end of the last century and it doesn't seem to be slowing down any time soon. And, Burt Process Equipment is surely keeping up with technology! Keeping up with this theme, one of our Marketing interns, Nicole Schoolcraft, has been working closely with Sue Burt to increase Burt Process Equipment's social media presence. We have included an article written by Nicole (see below) and we encourage all employees, whether Salesforce Users or not, to help increase social media activity for Burt Process Equipment on the five key social media tools (LinkedIn, Facebook, Twitter, YouTube and Instagram). Nicole's article includes hyperlinks to all of these platforms. We encourage everyone to reach out to Nicole and play a role in this very important endeavor. Sue and her team are also launching an updated BPE website with an increased focus on People, Service and Value.

So, as you can see, there are a tremendous number of positive changes happening here at Burt Process Equipment!

Burt Process Equipment is building its social presence and we need your help! The bigger the following on our social platforms = increased reach and discovery = more leads = more customers = **MORE \$\$\$**.

Increasingly, more B2B buyers are using social media in their purchasing research. If your business is not on social media, you're missing an opportunity to get your brand name in front of these buyers. This also helps drive more traffic to your website, which will increase our search engine optimization. But social media management is not an overnight fix, it takes time, effort and the help of your colleagues. **How can you help?** Follow, share, recommend, like and comment on any Burt Process Equipment posts! Almost all social media platforms put the most engaged posts at the top of user's timeline, that's where we want to be. Users are also more likely to engage with a post if it already has comments and likes on it. Feel free to reach out to me with any questions and thanks for your help! - **Nicole Schoolcraft, Marketing Intern**



Motto

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





Developing a Learner Mindset at Work

Contributed by...Jonathan Dearborne

There are plenty of things successful people do differently. One example is a person's ability to apply context to any situation. The person does not view incidents in isolation, but in connection with each other.

Finding learning opportunities in apparent crises is something that many people (including me) have trouble doing. It takes patience, observation and the ability to accept that there is a situation (whether caused by you personally or not) and to take that situation and see it a learning opportunity and not a terrible thing that reflects on you personally. Everyone make mistakes, but the ability to see past the mistake is something that can make a person truly successful in life and in their profession. Here are some great approaches a person can take to develop this "Learner" mindset.

First is *creative collaboration*. It is a natural response to look at your direct manager as your immediate mentor. But learning is also social and collaborative. When it comes to team operations, work is constantly flowing between people with varied capacities and training. By collaborating with your peers creatively, you can contribute to a more

Second, is *LISTENING* (something that I'm sure no one including me is perfect at). If we take the time to truly listen to someone, it can provide clarity and direction much smoother and quicker than just letting it "go in one ear and out the other". Beyond just attending training seminars or workshops, we need to learn how to listen. Listening on the job takes patience, and a healthy interest in what others have to say. It allows you to give educated and thoughtful responses to the discussion at hand.

Third, a person needs to be *open to new ideas*. A person must be able to listen to new ways of doing things and always have an open mind. When you're open to new ideas, your views and though processes are broadened and enhanced in positive ways that may provide solutions to problems you did not think of before.

Finally, a person must be able to *take risks*. Taking risks at work may seem like a scary prospect. But with a learner mindset, you will find yourself making calculated, smarter risks to accelerate your growth in the workplace. For a large part of our educative years, we have seen how failure is called out as the worst possible outcome. By taking risks, you begin to overcome your fear of failure and see them as positive learning opportunities that you can grow from and you can sue to better yourself in the work place and your own life.

The Salesforce implementation provides a perfect opportunity for everyone to take the first steps in adopting a Learner mindset!



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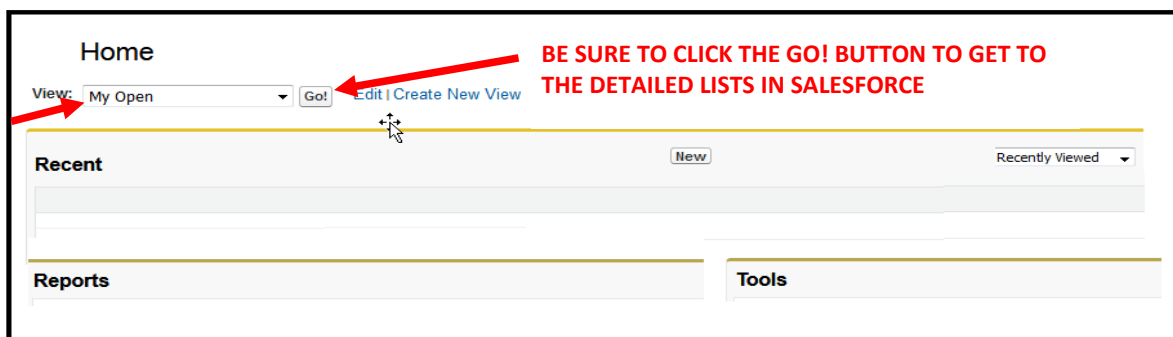


SALESFORCE TAB PAGE LAYOUTS & THE GO! BUTTON

As you have learned and now experienced, Salesforce is a logical system, which provides a lot of consistency. So, as expected, Salesforce provides views for you to quickly access data and activities. Five key Salesforce Tabs that almost all Salesforce Users work with regularly are: **Accounts, Contacts, Cases, Leads and Opportunities.** When you click on any of these Salesforce tabs, there is similarity in the page layout and views that you should keep in mind.



Although the Home view for each of these Salesforce Tabs are NOT identical, they all have similar anatomy in which recently viewed data will appear under the "Recent" section and applicable "Reports" and "Tools" sections are located at the bottom of the screen.



This is the standard view you will get when you click on the Salesforce Tabs. In order to see the detailed list of data, you need to be sure to choose a View from the available dropdown list and then Click the Go! button. The dropdowns provide views to Open activities, Queues, etc.



Note that the Salesforce Team can assist you with Editing Views or Creating New Views.



"I have found that using the tool bar has allowed me to almost effortlessly enter all RFQ'S "opportunities" in salesforce with a few clicks of the mouse. Once the opportunity is created and a quote number is generated in Salesforce, I can easily attach the email to the opportunity. Furthermore, when I receive the purchase order for the opportunity, using the toolbar I can find the opportunity created and attach the PO directly from Outlook into Salesforce."
Rebecca Crosby, Inside Sales



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