



## Go With the Flow Newsletter

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



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

Welcome to Fall! Fall is a great time of year to get things done. The weather is much cooler and everyone is excited about all the fun things that Fall brings with it...hot apple cider, changing of the leaves, Halloween, Thanksgiving, etc. At the same time, it's a great time of year to get organized, learn new things, complete projects, etc. And, these are things that we can do in both our personal and work lives.

Salesforce provides a perfect project for all of us to work on independently and as a team this Fall in anticipation of our Salesforce hard launch. We are so happy to see that everyone is embracing Salesforce and fully utilizing all of its capabilities. Although it seems like we have all been involved with the Salesforce launch for quite some time, all of our effort will pay off in the end with improved efficiencies, increased sales and better communication. And, the most important thing of all is that we have all worked as a Team to get to the final result - a world-class, state-of-the-art CRM system in place.

In many regards, I like to compare our Salesforce work to a home improvement project, which involves planning, a financial investment and a time investment as well as some "blood, sweat and tears" to complete the project. However, once the project is complete, you have a new room, a new porch, etc., which you get to use and enjoy, but you also have the satisfaction in knowing that you made the right decision to make the home improvement and you got the job done. And, you will see a tangible increase in the value of your property; this is often accompanied by a higher increase in your property value than the amount of your investment. For example, if you invest \$30,000 to add a room to your home, which is valued at \$350,000, you would assume that the value of your home would increase to \$380,000. But, this is not always the case...you might actually see the value of your property increase to \$410,000. Your investment has garnered a much greater return on your investment than you thought was possible!

Try to think of Salesforce along these lines - as a company, we will surely recognize a valuable return on investment with Salesforce and that return comes with a lot of extra bonuses, which include higher sales, improved communication, better customer service, new employee skill sets, etc.



### ***JUST A REMINDER***

Please help Burt Process Equipment to build its social presence by following, sharing, recommending, liking and commenting on any Burt Process Equipment posts! Users are more likely to engage with a post if it already has comments and likes on it.



***Motto***

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





## Communication and Teamwork with Salesforce



Contributed by...  
Matt Liuzzo

As the soft launch of Salesforce progresses, hopefully everyone is starting to see the ways that it can help us work more efficiently together as a team. This system is a huge boost to our vision and offers us the ability to work together to solve complex problems more seamlessly.

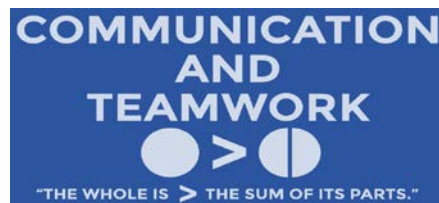
The logging functionality within Salesforce accounts, opportunities, leads, and cases allows everyone to pick up a project and understand not only what work was done but why it was done. It offers information and also gives us context and understanding of the thought process of our team members as they proceed with closing out a sale. We can use this new wealth of information to better collaborate as teams.

Now that we all have access to this wider view of each opportunity, how do we best utilize it? Salesforce allows us to manage accounts better by quickly identifying the next step required to get closer to closing out every sale. We're all able to be a bit more proactive as it's much easier to see how each opportunity is progressing in real time. Another one of the best advantages that I've found is that it's now seamless for someone to step in and pick up where someone left off in the event of an absence or other complication that leaves a team member unable to continue work on a job. There's no more need for long explanations of each open job before someone goes on vacation or is absent unexpectedly. Instead, we can quickly issue tasks associated with the records we've kept and the transition is effortless.



**At your service...**  
**The Solution Pioneers & Salesforce Teams**  
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The most important part to make this all work is to make sure we're actually using the software. The information available for us all to use is only as good as what we input. Remember to keep your records detailed yet concise - this will not only help you but will help the whole team. You may find this to be tedious at first but I assure you over time it will come naturally and you *will* see a benefit!



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# Important Reminders



Leads

Please be sure to open all of your Leads. You are expected to read and process your Leads, Opportunities and Tasks on a daily basis. **All** open Leads and Opportunities should have a next step...an **open Task or activity**. Please verify that you have these.

All Leads should be addressed and moved through the process within **24 hours**; Leads must be converted, nurtured or closed within the 24-hour timeframe. If you close a Lead, you must use the dropdown for the **Reason Closed** to indicated why you closed it.

Although Salesforce provides a Tasks Tab that you can add to your Salesforce Navigation bar, please be advised that this Tasks Tab **ONLY** provides project-related Tasks and it will **not** provide your Tasks list. Your Tasks list can **only** be accessed from your Home Tab in Salesforce. *Note that you can also create and run a Report in Salesforce to help manage your Tasks.*



Task and Activities



Opportunities

Burt Process Equipment has adopted the following naming convention for Opportunities, which anyone creating an Opportunity should use:

**Your Initials - Date - Account - Product**

For example, if **John Mark Smith** creates an Opportunity on **September 28, 2018** for **Norkco** for a **GF pH Panel**, he would name his Opportunity as follows: **JMS - 09/28/18 - Norkco - GF pH Panel**

In Salesforce, you can follow Accounts, Contacts, etc. The quickest way to follow something is to use the **Go!** button on any Salesforce Tab. For example, if you go to the Contacts Tab and click the **Go!** button, it will bring up a list of your Contacts. Simply click **+** which appears to the left of the Contact you want to follow and it will change to **✓**



The **Overview** section of the **Profile Feed Tab** displays your **Followers** and what you are **Following**.



We just wanted to send out a quick reminder about the increased activity of email scams. Amoskeag recommends that you send out notification to all your users that they should always be concerned if they are asked in an email to buy things like iTunes gift cards, Wire money, etc. from anyone even if they know the person. A quick phone call to the person they think sent it can save you from having to deal with many different issues as a result. Thanks, Amoskeag Network Consulting Group, LLC



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# Which email addresses should be used for various Q&A

## HelpDesk@burtprocess.com:



- IT assistance
- Additional Hardware/Software Requests
- Remote Access
- P21 Technical Issues
- Outlook/Outlook Calendar issues
- Printers/Fax issues
- Password resets
- Go To Meeting assistance
- Slow/frozen computer
- File Management
- Phone issues

## BPEData@burtprocess.com:

- Item ID/Description Maintenance
- Primary/Secondary Supplier Maintenance
- Data Discrepancies
- Pricing Discrepancies
- Tariff information/questions
- New price files
- Price notices
- Item Discontinued or Phase Out Notices



## BPESalesForce@burtprocess.com:

- Salesforce How To
- Account changes/issues
- Salesforce Password help
- Salesforce merges and account updates
- Anything Salesforce related



## Receptionist@burtprocess.com:

- Customer Set Ups
- Add ships
- Vendor/Supplier Forms  
(to set up a vendor/supplier this would go to Carolyn not reception)
- Fax Requests (everyone should have the ability to fax, I don't understand why we lost that individually as this was never a function of reception with the exception of supporting Bill Burt - I'd like to see if we can get access to having individuals fax again)
- P21 merges and account updates
- Customer Requested: vendor forms, supplier forms, insurance certificates
- P21 Contact Updates: Accounts Payable

Receptionist



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