



So You've
Implemented
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Now What?



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It's a landmark moment for any organization to implement its first instance of Salesforce—especially for complicated, regulation-heavy industries like Financial Services and Healthcare/Life Sciences. You've spent a great deal of time and resources building a ship to carry all the components your business needs to be successful. All the boxes have been checked, all of the training has commenced. And you've completed UAT (User Acceptance Testing), meaning the boat is ready for launch. You've smashed the champagne on the bow, the ticker tape parade is over...but the boat is still sitting in the harbor. Now what?

It can be difficult to know what course to chart next to ensure you're getting the continuous return on your investment and heading in the right direction. This ship is going to take your business to amazing places, but first thing's first: You need to get out of the harbor.

Being stuck in the harbor means you likely aren't seeing a return on the investment you've made in your Salesforce instance. You're likely still using out of date, manual external processes to get the job done, and you're struggling with uneven adoption across your business by stakeholders and customers alike. There you bob in the ocean, begging people to get on board—but only half of the people you need have agreed to get on the ship!

Let's look at some reasons why you aren't already underway.



5 Reasons You May Be Stuck in Harbor

1

Resource Issues—Three Cooks, but No Helmsman

With the implementation of any new technology, it's important that your team is able to tackle new projects or issues as they arise. As your tech capabilities grow, the skillset of your team needs to grow as well. If you only have a skeleton crew in place, the arrival of a new Salesforce release (there are three a year!) or multiple projects at once can overwhelm the team, leading to frustration, mismanaged projects, or missed critical deadlines. But the solution isn't to hire as much talent as possible, either—carrying extra weight between projects isn't ideal. A lot of companies get stuck in the harbor because they don't have enough staff to complete projects, or they went overboard with hiring and now they're struggling to find value.

2

Classic Woes—Worn Ropes and Fading Sailcloth

You've been happy with your Salesforce implementation, but you've been hearing about all the additional capabilities of Lightning. You're ready to make the switch, but you don't know where to start. All you know is that you can't move forward if you're still stuck in the past. To ensure you continue to get a return on your license investments and have the latest updates Salesforce has to offer, a move to Lightning is a smart next step on your journey. Some of the best, bleeding edge functionality will only be available in Lightning, not Salesforce Classic. Proceed with caution! Though there are a lot of DIY guides out there, this journey is best completed alongside experts at your helm.

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3 Your Marketing Automation Path Isn't Charted

At the time of implementation, you weren't sure about your marketing automation plans, and you know that Salesforce has some great native tools. You've read all about how smarter marketing automation can give you big gains for your business, but don't have the resources with the knowledge required to get you up and running—your IT and Marketing teams are stretched to the max! Now that you've purchased your preferred tool, you just need a little help to kick off the next round of campaigns and messaging that will catapult your company to the next level.

4 Unexpected Changes—Crew Lost at Sea

You've just lost key members of your team and can't afford the lost time while replacing them. The sea can be a turbulent place, and sometimes we lose crew members when we least expect it and most need them! Having a team that can drop in and accomplish specific requirements while hiring new crew will make the transition smoother and drastically reduce downtime for your users so you can keep delivering value for them. You need resources that know the platform inside and out that will bring a wealth of experience and deliver quickly.

5 Your Team has Gotten Too Comfortable in the Harbor

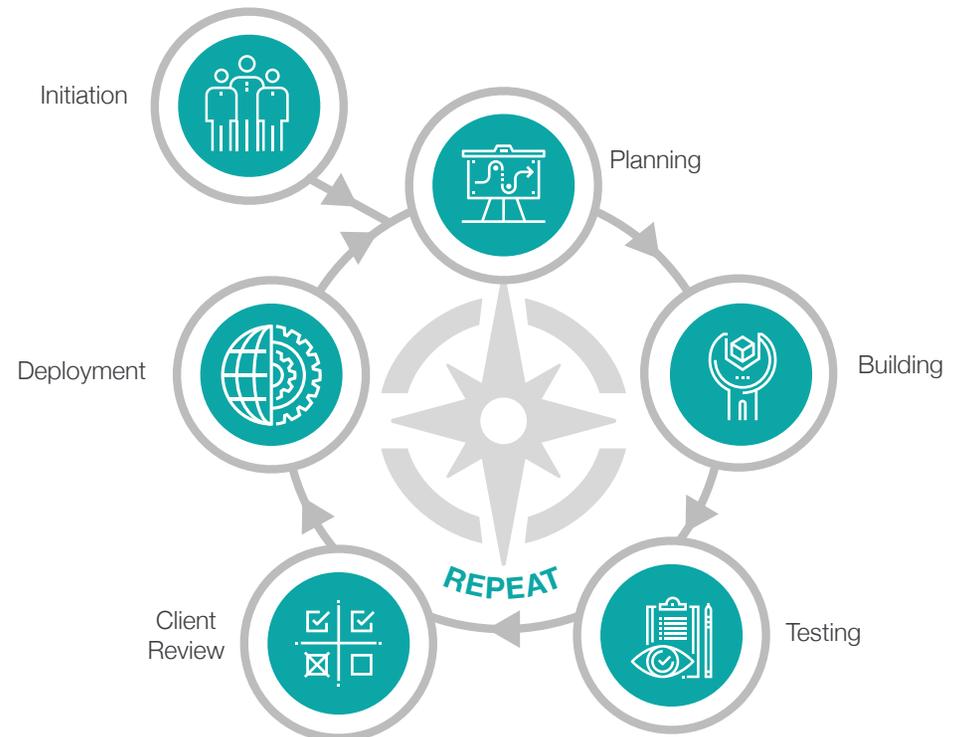
Finally, you may be stuck because you aren't leveraging the entire Salesforce instance you've built and therefore you aren't seeing the return on your investment. There's nothing worse than feeling like you're leaving platform functionality on the shore rather than having it loaded on your ship. With cargo this precious, you need to ensure you have every piece you've paid for and need for your journey. Unleveraged pieces of your platform may be due to a lack of adoption. A gap in adoption by your team may show up in different ways; siloed systems and processes remain, you may be struggling to see how the team is performing, or you may be hearing general rumbles from your crew on deck of your ship whispering *mutiny*.

Getting stuck in the harbor may seem insurmountable, but it's quite common and nothing to panic about. Finding the right partner to fill your sails with wind and make sure your equipment is ship-shape will get you out to sea and sailing towards the horizon in no time.

What Should I Look for in a Partner Who Can Help Us Escape the Harbor?

Agile Methodology

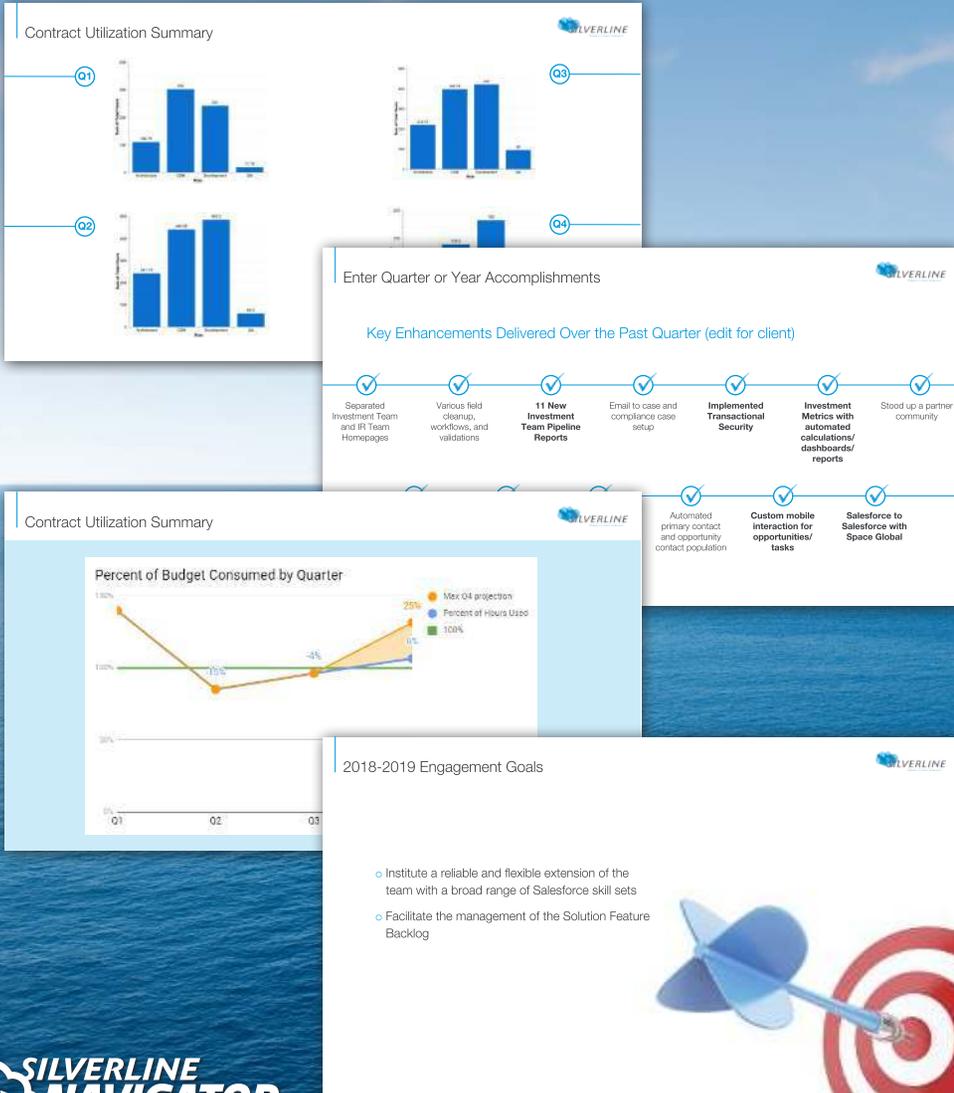
Agile is a project management method that allows for the rapid and flexible response to change through sprint-based project delivery. Working in two-week sprints ensures true collaboration between your organization and the consultancy, allowing for continual value and improvements to your organization. Sprints mean you'll have frequent check-ins to ensure you're sailing in the right direction with your releases and project management. Just like coming about on a boat, you need to check your position before setting off on a new direction, and the Agile methodology is tailor-made for pinpoint location accuracy.



Quarterly Business Reviews

It's no secret that you want to get the most value out of your Salesforce Platform—and whether or not you're actually getting that value shouldn't be a secret either.

Does the consultancy offer regular check-ins within the project to monitor success and make sure you're hitting your targets, that the way is clear of obstacles, and make sure you don't run aground on your own anchor.



Use Case Study Reviews for Future Planning and Resource Scaling

A consultancy that leverages story points (actual use cases related to your business) for urgent quick tasks in every sprint means they are ready to address issues that keep your business from running smoothly. Will they implement reviews, monitoring, and future data planning? In sailing, proper instrumentation and charts are essential tools for correct navigation, and the same holds true for successful Salesforce Platform projects.



Flexibility

Can the consultancies' resource, locations, and hours be adjusted, allowing for release planning and budgeting considerations in a timely manner? The decision on when you grant shore leave should always be in your control.

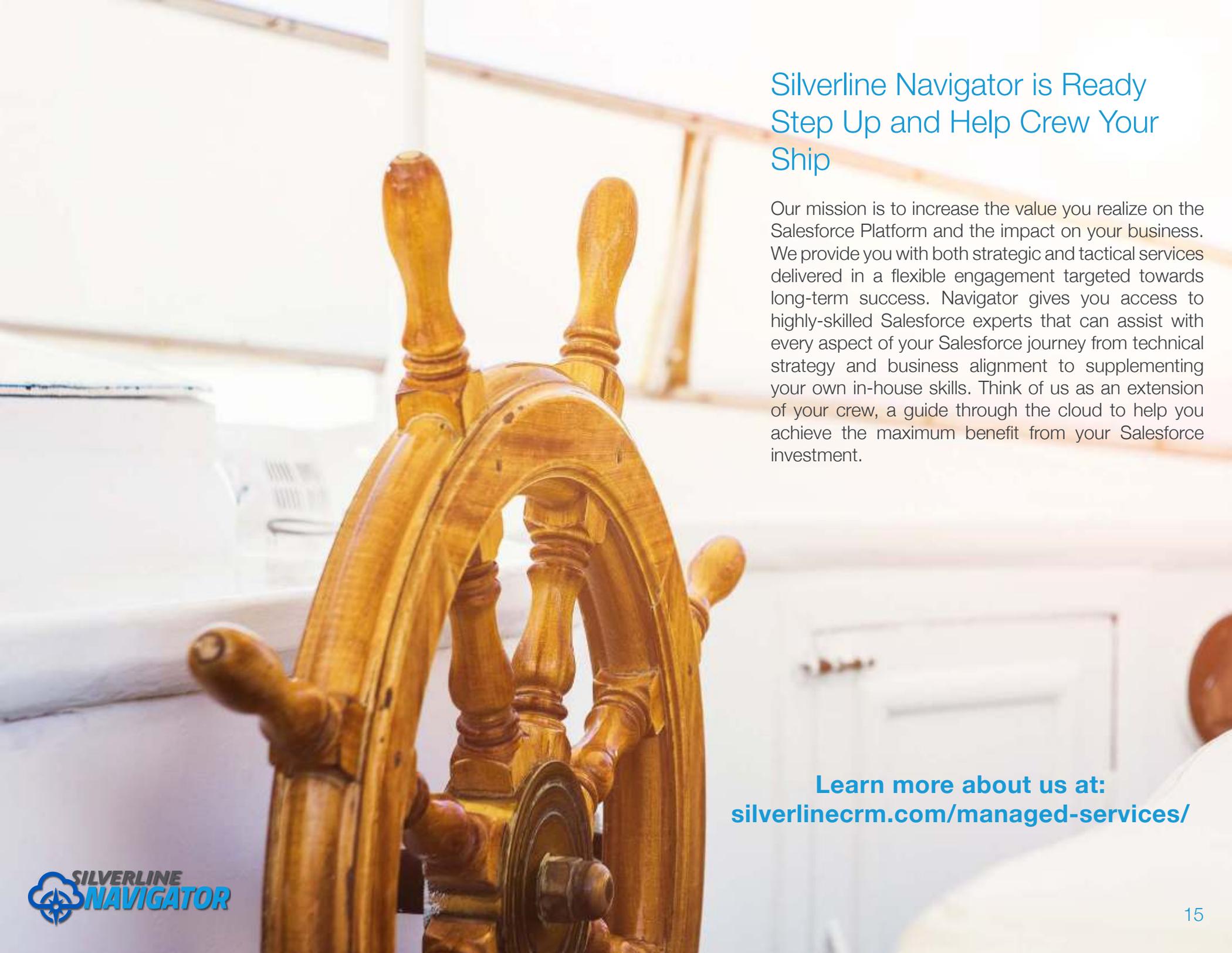
An aerial, top-down view of a tropical island. The island is lush with green palm trees and other vegetation. A white boat is visible in the clear blue water to the left of the island. The water transitions from a light turquoise near the shore to a deeper blue further out. The island has a sandy beach and a winding path or stream through the trees.

Our mission with our Silverline Navigator team is to increase the value you realize on the Salesforce Platform and the impact on your business. Not only do we want to help guide you out of the harbor, but we also want to share with you the wealth of experience we have enabling businesses to be successful to ensure you are setting sail to a destination and not just taking a pleasure cruise.

Here are some additional suggestions on setting your sails for success based on our experience with our clients:

- One Year Release Planning
- 3rd Party App Analysis and Recommendations
- Security Review and Implementations
- Adoption and Training Programs
- Mobile Apps
- Marketing Automation
- Analytics and Community Management
- Integration Enhancements
- Custom Lightning Components

Like a bar pilot that guides a ship over dangerous sandbars at the mouths of rivers, bays, and docks, a Silverline Navigator engagement is meant to help you get out of the harbor and avoid hitting obstacles as you begin your journey.



Silverline Navigator is Ready Step Up and Help Crew Your Ship

Our mission is to increase the value you realize on the Salesforce Platform and the impact on your business. We provide you with both strategic and tactical services delivered in a flexible engagement targeted towards long-term success. Navigator gives you access to highly-skilled Salesforce experts that can assist with every aspect of your Salesforce journey from technical strategy and business alignment to supplementing your own in-house skills. Think of us as an extension of your crew, a guide through the cloud to help you achieve the maximum benefit from your Salesforce investment.

Learn more about us at:
silverlinecrm.com/managed-services/



Silverline creates unique digital experiences that transform the way our clients do business. As a Salesforce Platinum Cloud Alliance Partner, Silverline leverages best practices acquired by over 1,200 implementations, with significant expertise in the Financial Services and Healthcare industries. Our Industry solution focus combines Strategic Advisory, technical implementation, and ongoing Managed Services to enable organizations to achieve maximum value with the Salesforce platform. Additionally, Silverline offers popular AppExchange applications and industry-proven Fullforce Certified accelerators.

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