5 Ways to Automate Collaboration Between Sales Teams and Everyone Else

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Introduction

Organizations require a top of the line sales team to succeed in an increasingly competitive marketplace. Effective sales teams achieve the highest, most sustainable sales performance by staying organized with Salesforce, the leading SaaS Customer Relationship Management (CRM) software. Salesforce enables teams to keep sales pipelines running, deliver accurate reports up the chain of command, and capture data for better decision making.

However, that's only half the story. If the sales team is split off from other departments, after-sale service suffers, and decision makers lack visibility. This ebook explores the challenges of getting Salesforce data out of a silo, and shows how Smartsheet's integration with Salesforce helps bring key information into the whole organization's workflows automatically, without making anyone change the way they work.

Smartsheet for Salesforce

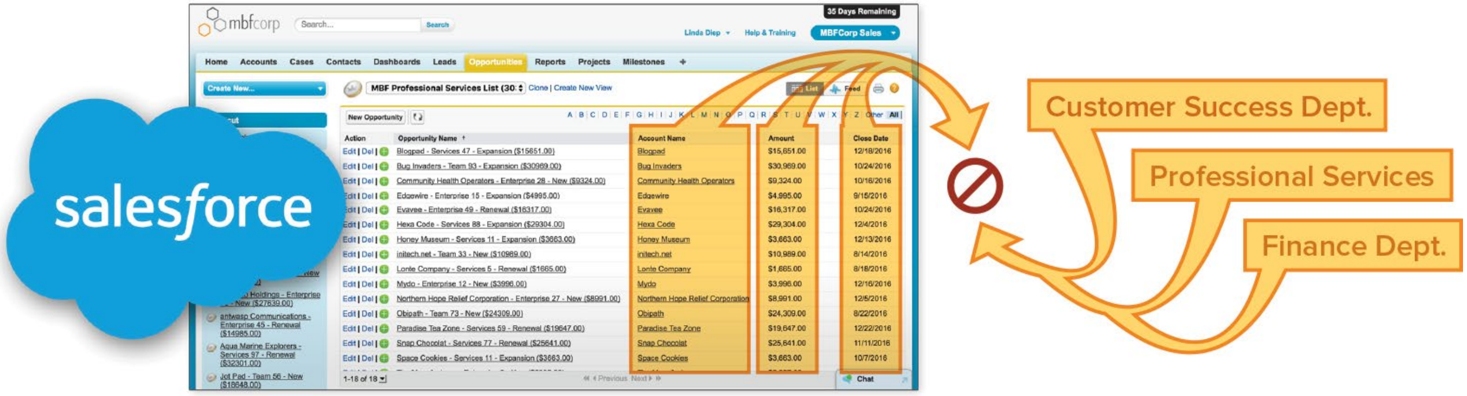
A software integration that increases visibility, collaboration, and efficiency within sales departments and for other organizations who might not have access to Salesforce.

Smartsheet for Salesforce:

Breaking the Big Data Silo

As a CRM system, Salesforce contains a vast amount of data for the sales team to act on. But when another team needs to access Salesforce information, all of a sudden that robust data becomes cumbersome to manage. Most other departments don't need access to the entire platform, they just need pieces of information and overall reports relevant to their work. If they aren't power users, they won't know how to find the data they need, and if they aren't subscribers they can't pull it at all without requesting it from sales.

The sales team's data is effectively in a silo. When Sales closes a deal and managers update their actuals, that information may not be accessible by the customer support team who installs the new customer's product, or by the marketing manager who's tracking the success of their campaigns. That data has to be exported to a .CSV file, and managed in a spreadsheet or imported into other tools, which often don't have parallel fields for every entry. That means out-of-sync data, more room for human error, and time wasted - especially for salespeople who often have to roll these data entry tasks into their precious few selling hours.



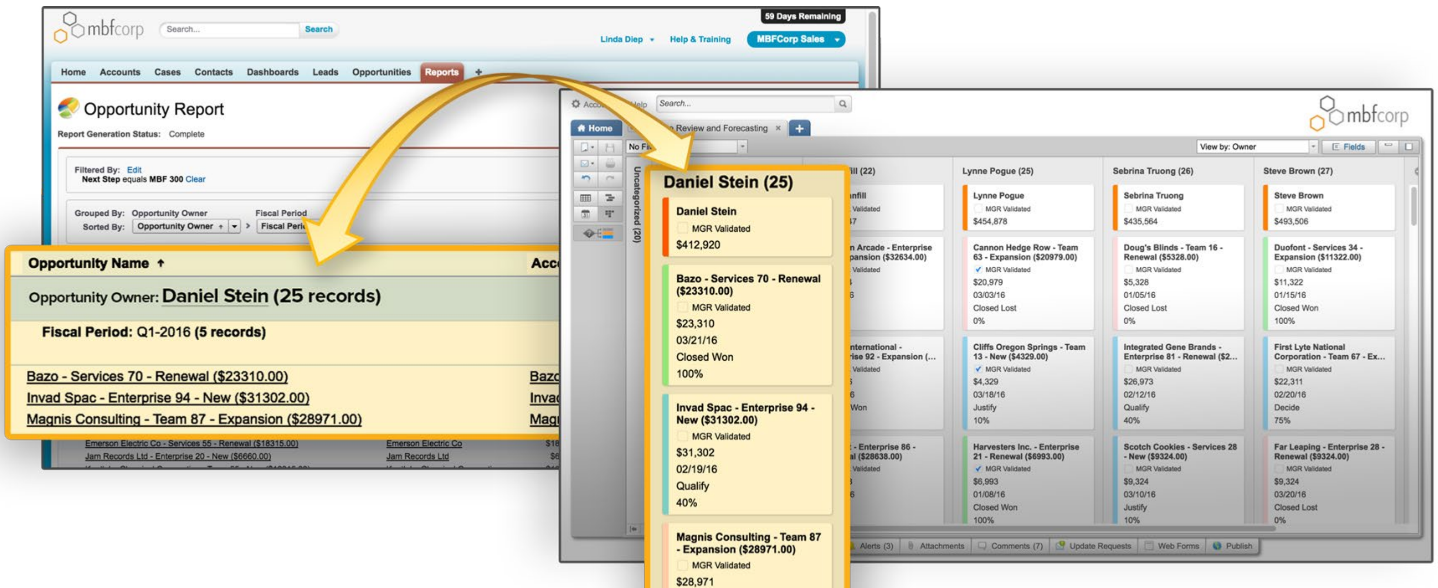
Smartsheet for Salesforce:

Visibility, Collaboration, and Efficiency

This is where Smartsheet for Salesforce can help your organization. Smartsheet is a cloud-based SaaS platform for managing and automating collaborative work and is fully configurable to fit the needs of any department.

Smartsheet for Salesforce is an integration that helps break sales team data from its silo and automate its use both for sales reps and for non-Salesforce users throughout your organization.

The integration syncs the two applications, keeping the data identical regardless of whether a change was first made in one system or the other. Once synced, customer and opportunity data recorded in Salesforce automatically appears in Smartsheet, allowing salespeople and non-salespeople to sync data, keep each other aware of progress, assist in making plans, and collaborate on projects and processes in real time.



Common Salesforce Challenges

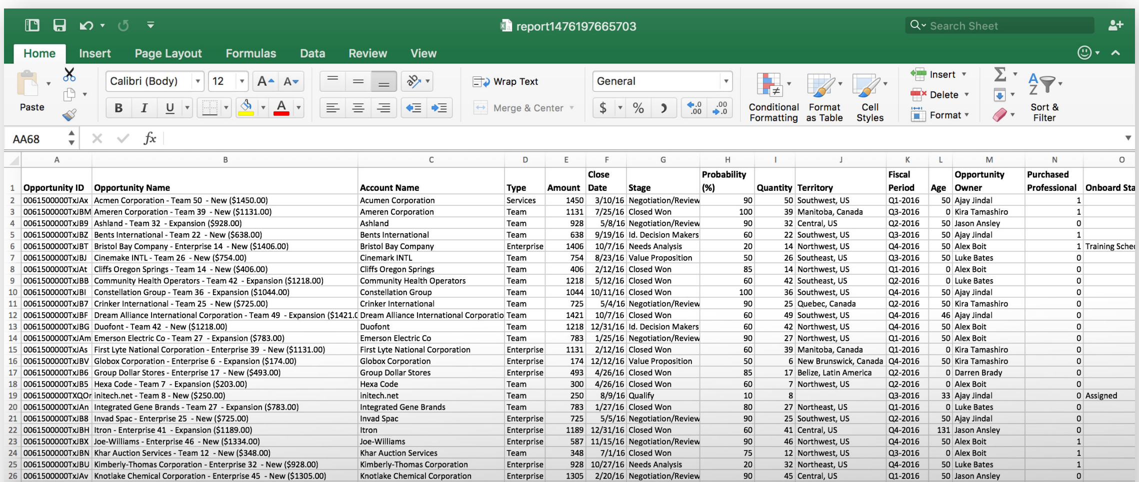
These common challenges can add up to major inefficiencies in an organization.

Common Salesforce Challenges 1:

Manually Importing and Exporting Data

Salesforce stores massive amounts of data, but getting the data out of Salesforce and into other platforms is a time-consuming and often manual task. Not every team in your organization is using Salesforce - they have their own tools they've invested in. They're likely already working efficiently and aren't interested in starting from scratch.

Since management, operations, marketing, and other teams want to keep using their tools, they need to pull Salesforce data into those tools. That means requesting the information they need from sales teams, who have to export an entire section into a raw .CSV file and send it over to the requester, at which point the requester must import it into their tool or open it in Excel. Just because a bulk import is possible doesn't mean it's pretty. The information fields won't all have an equivalent, which means the data needs to be massaged in a spreadsheet, a time intensive task. The same goes for external data that needs to be imported into Salesforce, which can lead to lost formatting and context around the data.



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Common Salesforce Challenges 2:

Human Error & Discrepancies

Not only does manually scrubbing data take a lot of time, it's also rife with potential errors. Even a professional's eyes will glaze over while editing row after row, especially in a raw file with all the information crammed together. There are plenty of chances to make an unnoticed mistake, leading to inaccurate data down the line. Most people might not type in every cell, instead using automatic editing features like Find & Replace to speed things up. But when you're setting these rules loose on a sheet of pre-existing data you've barely glanced at, there's even more chance to create errors and accidentally introduce bad data.

Even if every bit of human error could be eradicated, there would still be one big problem - data discrepancies. Say all relevant data was correctly imported into a new program. That doesn't mean it will be the most up to date tomorrow. As people are working with exported data, salespeople are simultaneously updating that information in Salesforce. This means the data you spent time requesting, scrubbing, and importing needs to be replaced, potentially daily.

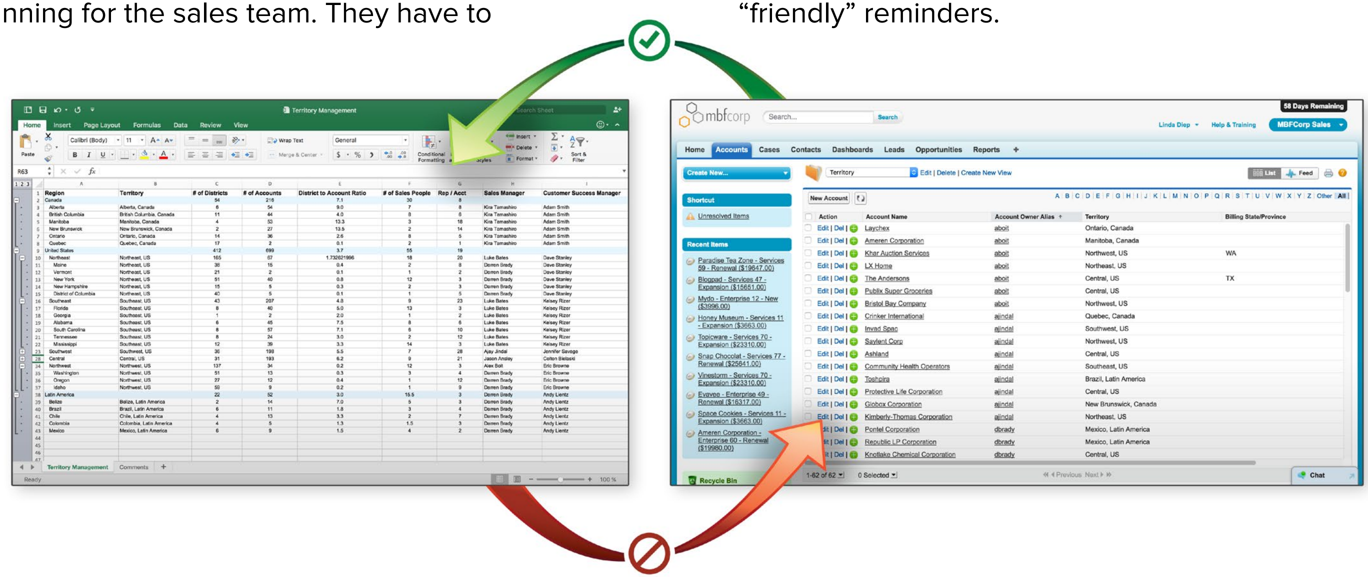
This goes the other way too - external project plans, contact lists, and other data sources are constantly being updated. Processes requiring manual exports and uploads to Salesforce will leave the data within Salesforce out-of-date.

Common Salesforce Challenges 3:

Making Bulk Edits

This brings us to the final challenge. Changes made to exported Salesforce data have to be reconciled afterwards piece by piece. This is frustrating enough for one account, but what if you're managing data for an entire sales team and want to change information in all of their accounts simultaneously?

For example, say a sales manager needs to perform territory planning for the sales team. They have to pull each rep's data to create a spreadsheet with all territories and performance, then divvy up the assignments, and either send the whole spreadsheet out to the team or email every individual rep their assignment. Either way, each rep must change their own assignment, and if someone is slow or forgets, there's the chance of duplicate efforts. All of this requires a lot of emails, IMs, and decreasingly "friendly" reminders.



Use Cases

Let's take a look at 5 ways you can sync data in Smartsheet for Salesforce that allow collaboration to be easy and automatic.

Use Case 1:

Automatic Sales Pipeline Visibility

Situation:

Sales managers across the globe export sales pipelines into spreadsheets to review with their teams, make notes, and recommend changes

- Before meetings, managers run their reports and then manually export them.
- After meetings, each team member goes back to Salesforce to make the discussed changes.
- These administrative-type tasks add up quickly, at the expense of selling time.

Solution:

With Smartsheet for Salesforce, set your sales pipeline forecasts to automatically populate a sheet in real-time. No need to export details prior to team meetings.

- Teams can update details like close dates, transaction amount, and stage directly in the sheet.
- Sales teams can use Card View to drag and drop opportunities between stages, Calendar View to see when deals are closing, and Gantt View to review deal cycle times.
- Changes made in one view are reflected in all Smartsheet views and in Salesforce.

Benefits:

Without changing your team's behavior for managing pipeline reviews, you can improve the ease of updating your data, save significant time across your team, and gain valuable new insights into your sales process.

- Save each team member a minimum of 10 minutes every day.
- Begin recovering selling hours and morale lost to data entry.

Use Case 2:

Joint Close & Service Plans

Situation:

When working to close deals, sales reps often build a joint plan to ensure the customer's process is followed and all requirements are met.

- Plans help drive key milestones towards specified close dates and require frequent updates.
- Processes contain shared responsibilities between the sales team and the customer.
- Keeping everyone on the same page is tough, especially when salespeople update notes and status individually within Salesforce.

Solution:

With Smartsheet for Salesforce, sales reps can sync close plans with customer information into a joint plan sheet that everyone can access.

- Collaborate with the customer to complete tasks in the sheet and automatically update status in real-time with the opportunity in Salesforce.
- Use Smartsheet Sights to create a project team dashboard that highlights key sales data.
- Include key metrics like number of deals closed, total project value, average project cycle time, and resource allocation.

Benefits:

The sales process becomes smooth and seamless for the customer, creating a great sales experience.

- Stakeholders have visibility into status and can make updates that notify everyone else in the process.
- All changes are reflected in Salesforce in real-time, so each salesperson can ensure accurate reporting.
- Sights give executives a high-level view of KPIs without having to dive into the data.

Use Case 3:

Project Initiation & Handoff

Situation:

The sales team for a project-based organization closes a deal and updates the opportunity in Salesforce. What happens next is not always consistent.

- Sales reps may forget about the hand off, or rely on their sales manager to review closed deals and do the hand off.
- Results in the project team not getting notified to connect with the new customer, setup their project, and begin the work.

Solution:

With Smartsheet for Salesforce, teams can create collective project sheets that are owned by the project team.

- Once opportunities are closed in Salesforce, the update automatically generates a new row in Smartsheet populated with key details. (Teams choose which details to map from Salesforce to Smartsheet.)
- Project team is automatically notified of a change on the sheet so they know there's new work to kickoff.
- Provides insight into the sales pipeline to see which deals are closing, and provide for better resource planning.

Benefits:

Now the project team is better informed and ready to go in a tool they're comfortable with.

- No extra work is required from the sales team or sales managers.
- Improves relationship between sales and project teams, because updates to project rows notify the sales rep of status.
- Anything mapping back to opportunity data will update automatically in Salesforce.

Use Case 4:

Territory Planning

Situation:

As sales teams grow, territory assignments are always changing.

- Many territory planning tools still require exporting Salesforce data to a spreadsheet, changing assignments, and then sending them to team members to individually update their assignments in Salesforce.
- It's time consuming and doesn't allow for quick adjustments.

Solution:

With Smartsheet for Salesforce, territory data from Salesforce can be linked with a cloud-based territory planning sheet owned by a sales manager.

- Other contributors, such as regional sales leads, can collaborate on it in real time.
- When the assignments are changed, the updates are automatically pushed into each team member's Salesforce instance.
- The whole team is on the same page.

Benefits:

Rather than requiring several requests for information, bulk edits only need a few quick keystrokes from a centralized spreadsheet.

- As teams grow, minor changes can be made without the need for large-scale re-alignment projects.
- Helps teams be agile in their assignments and ensure that reps are always focused on top targets.
- Reduces risk of sales reps accidentally calling prospects in their old territory assignment.

Use Case 5:

Calculating Commission

Situation:

Sales operations and finance teams still often rely on static spreadsheets to manually calculate commissions for sales teams.

- They export deal information from Salesforce and run it through formulas based on each rep's commission plan.
- Requires duplicate data entry, is time consuming, and error prone.
- Lacks transparency for the sales reps who will be curious about their payout.

Solution:

With Smartsheet for Salesforce, sales managers can automatically share deal data on individual monthly booking sheets unique to each rep.

- Finance can access the sheets and calculate commission directly in each sheet, improving transparency for the sales rep.
- Totals are linked to a sheet owned by sales operations, allowing them to calculate sales budget and total payout.
- Commission approval is granted in real-time, prompted by notifications sent to sales managers based on changes.

Benefits:

With less manual data entry and increased automation, the commission's process is more transparent and streamlined.

- Sales reps don't have to pester managers for commission approval.
- Anyone can be granted access without giving up privacy, so Finance and Operations don't have to spend time hunting down details.
- Small adjustments can be added to all sheets in bulk, so changing conditions aren't difficult to implement.

Conclusion

Smartsheet for Salesforce results in better data, better collaboration, and better decision-making.

Conclusion

Smartsheet for Salesforce helps sales teams spend less time managing administrative tasks and more time selling, because when sales are strong, the whole organization wins. This integration makes Salesforce's powerful data automatically visible and manageable to other teams. With customer and opportunity data synced - whether edits are made in Salesforce or Smartsheet, every department is kept on the same page. That means better data, better collaboration, and better decision-making.

Smartsheet for Salesforce is a premium capability available for additional fees to customers with Team and Enterprise plans.

Learn More About Smartsheet for Salesforce

smartsheet.com/salesforce

About Smartsheet

Smartsheet helps nearly 90,000 organizations and over 7 million users automate processes to deliver their best work more efficiently. With a familiar spreadsheet interface, Smartsheet enables teams to collaborate more easily, boost productivity, and gain visibility into the work being done.

Smartsheet is used by organizations across all major industries, including technology, construction, financial services, and education.