



WHITE PAPER

BLUEPRINTING: A WINNING STRATEGY

A GUIDE TO GET YOU MOVING IN THE RIGHT DIRECTION

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Businesses making the switch to Salesforce, the leading customer relationship management (CRM) solution, need an implementation plan that allows them to drive user adoption, improve KPIs, and realize the business benefits the Salesforce platform enables. Failure to execute your Salesforce implementation transition properly can cause serious headaches and lasting repercussions to the bottom line.

Salesforce's own State of Sales Report notes 81% of sales representatives believe it is important to have a connected view of data across the entire customer journey.

Yet, just 49% of businesses report having a fully integrated customer engagement platform. High-performance sales teams are more than twice as likely to have these systems in place. Furthermore, the State of Sales Report also finds sales representatives spend just 36% of their time selling. Unleashing your potential to break sales records and see real growth hinges on the efficiencies a Salesforce implementation can provide for your company. Successful implementation engagements require some foresight. Starting with your end goals in mind, garnering the right executive and financial support and building a plan (Blueprint), will dramatically increase your chances of success.





We find that customers switching to Salesforce generally fall into one of two camps

- Those who launch immediately
- Those who build a plan first

Issues can easily arise if you move quickly without a plan. We see clients who mistakenly rebuild their legacy system on Salesforce, simply to replicate the same issues they set out to fix. The number one reason companies make this mistake is a failure to budget time and money to build a plan upfront.

No matter your investment, without a plan you will fail. A solid plan will separate those that fail from those that see success implementing Salesforce in their organizations. At Apexon, our expert team of Salesforce consultants and architects will guide your organization through the complexities of selecting and implementing the most effective solution by designing your Salesforce Essential Blueprint.

“Focusing on avoiding failure when it comes to implementing a Salesforce project, can mean that your organization is doing things the same way as you did before, or you’re only making minimal changes. You’re failing to see the larger possibilities the platform offers. Instead of focusing on failure, focus on transformation.”

Kelly Hardebeck, Vice President, Customer Success Services at Salesforce

WHAT IS BLUEPRINTING?

Blueprinting defines the scope, requirements, solution & architecture design for your initial Salesforce implementation, and provides a full accounting of the Salesforce capabilities required to enable your business. Apexon's Blueprinting process goes the extra mile, accounting for future iterations and phases of your business platform.

We accomplish this by developing business and technical strategies, creating the Organizational Change Management (OCM) strategy to support each deployment location or BU, and defining the Salesforce capabilities that need to be enabled to ensure you get the ROI you are expecting. In short, we develop a holistic approach that details each capability needed to achieve the unique business goals clients desire.



“If the target is not truly strategic, the organization will be hard-pressed to summon the vigor necessary to tackle entrenched business processes or retool its organizational structure and garner expected returns.”

Source: [Harvard Business Review](#)

WHAT IS BLUEPRINTING?



Identifying required capabilities and enhancements (e.g., improved sales velocity, increased pipeline visibility) needed to achieve business benefit



Provide traceability from business benefit assumptions to tactical operational and technical improvement initiatives



Align operational and technical teams to target the most valuable improvement opportunities



Establish a business benefit and capability delivery timeline over the course of the program

Critical questions arise when considering the desired outcomes and sought-after benefits of a Salesforce implementation. Answering the questions below helps achieve the Blueprinting strategy that works best for your organization.



What capabilities should the project/program teams focus on to achieve optimum benefit realization in the shortest period?



What is the best sequence of capability delivery to improve operational efficiencies?



Should specific functional groups or departments be prioritized over others to accelerate returns?

The Salesforce State of Sales Report notes, 68% of sales professionals say it is absolutely critical or very important to have a single view of the customer across departments/roles. However, they are having a hard time delivering with their current technology stack. Only 17% of sales teams rate their single view of customer capabilities as outstanding.

Blueprinting identifies changes at the business unit level and highlights the change impact and readiness across lines of business. In addition, Blueprinting efforts identify the best Salesforce architectural solution based on your business targets and KPI goals.

Every company has a unique set of goals in mind when making the switch to Salesforce. Starting with the desired result in mind allows a Blueprinting strategy to best deliver those outcomes.



EXPECTATIONS FROM PARTNERS & STAKEHOLDERS DURING BLUEPRINTING

Apexon leads a Blueprinting Engagement with a Core Team supported by internal experts and Client subject matter experts (SMEs).

A Blueprint Lead oversees the Blueprinting process and acts as the primary point of contact through the entire effort. The Blueprint lead also facilitates Blueprinting workshops ensuring business goals (KPIs, strategic capabilities) are addressed in the overall solution and ensures completion of Blueprinting deliverables.

The Blueprinting team ensures the Blueprinting process achieves the best possible results for a Salesforce implementation. The first step in the Blueprinting process involves conducting workshops to create detailed future state processes and requirements. Think data sources, dependencies, integration needs, potential conflicts, and priorities. All facets of these critical components will be fully documented.

“Hyperpersonalization underpins true one-to-one interactions. Customers expect engagement, tailored to their history, preferences, context, and intent. We see CRM use customer intelligence gleaned from unstructured interaction data to fuel true one-to-one conversations. The data will include broader demographic data, conversational styles, buying indicators, social data, life events, and relationship graphs.”

YOUR ESSENTIAL BLUEPRINT INCLUDES:



Analyse and document business processes mapped to functionality and related use cases



Solidify detailed requirements and high-level solution & architecture designs for the implementation



Evaluate and design system integrations and products to extend the core platform (e.g., nCino)



Validate implementation scope and cost estimates

Stakeholder responsibilities:



Prepare for workshops based on identified agenda



Submit agreed-to artifacts in a timely manner



Drive for consensus



Think about “for now” and “for later” to help define a Minimum Viable Product (MVP) release



Be transparent: share what you know and expand beyond the questions asked

STEPS FOR SUCCESSFUL IMPLEMENTATION

A straightforward set of steps is at the foundation of successful Salesforce implementations.

These steps above outline a Salesforce implementation that delivers on desired user adoption, KPI goals, and ROI. Without a set plan, you are not likely to realize the goals of a transformative Salesforce implementation that takes your organization's performance to the next level. However, with a detailed roadmap in place and proper tracking methods, you will see massive system improvements and ROI for your Salesforce initiative.

A unique feature Salesforce offers called Trailhead assists new users in adopting and excelling in platform usage. The Trailhead platform is a library of educational content gamified with badges and awards for the demonstration of new skills, making learning the Salesforce platform more engaging. Trailhead content is available on demand, so it's always just a click away whenever your team needs to learn something new. The Trailhead platform offers learning modules on the full suite of Salesforce products and is regularly updated as Salesforce capabilities evolve.

Apexon is an industry leader, providing our customers with advisory, implementation and support services that improve KPIs, and drive higher ROI for their businesses. We can help you build a roadmap to address the business challenges you face, and exceed your goals. If you're looking to implement Salesforce, we're here to help.



Build a team to define vision and goals



Import data, define team permissions, and configure the platform based on unique business needs



Embrace company-wide engagement, training team members on system capabilities pertinent to their defined roles



Introduce additional functionality after users develop confidence in using the Salesforce platform



Evolve the Salesforce platform and team to ensure continuous improvement



APEXON IS A PURE-PLAY DIGITAL ENGINEERING SERVICES FIRM FOCUSED ON HELPING COMPANIES ACCELERATE THEIR DIGITAL INITIATIVES FROM STRATEGY AND PLANNING THROUGH EXECUTION.

We leverage deep technical expertise, Agile methodologies and data-driven intelligence to modernize systems of engagement and simplify human/tech interaction.

We deliver custom solutions that meet customers' technology needs wherever they are in their digital lifecycle. Backed by Goldman Sachs and Everstone Capital, Apexon works with both large enterprises and emerging innovators — putting digital to work to enable new products and business models, engage with customers in new ways, and create sustainable competitive differentiation.



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