

Open Up to the Possibilities

Get the Most Out of Salesforce®
by Extending ECM



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Every organization wants to improve its sales processes and associated results, and effective use of Customer Relationship Management (CRM) software like Salesforce® is critical to this goal. For an implementation to be successful, though, wide user adoption is essential.



One approach to both driving adoption and boosting the benefits that Salesforce offers is to integrate it with an enterprise content management (ECM) solution. This approach simplifies distribution of and access to critical documents and supports sales, service, and marketing teams with a consistent process.

Streamlining the content delivery process is essential as it improves utilization of the CRM system. The automation and simplification of delivering critical content – along with full documentation of that delivery -- is highly preferable to manual retrieval and tracking systems. Efficiency gains can be substantial; OpusCapita¹, a global customer interaction and payment processing firm, says employees can waste up to 25% of their time searching for documents.

The return on investment (ROI) from integrating content management and Salesforce is compelling. It can:

- shorten time to revenue
- boosts sales staff productivity
- improve content management and delivery efficiencies

The ability to track content delivery to customers and allied organizations is critical to managing the business. Using a combination of content management and Salesforce provides a record for the entire client team of what content, and what versions of that content, have been delivered. This type of information is invaluable when accounts are transitioned to new staff,

for example. This capability also improves customer service, as the client team can inform the customer of the status of content that is expected or has already been delivered.

Content management integration with Salesforce also helps speed the adoption of both automation and content digitization, improving the payback from these efforts.

Maximizing the Value of Salesforce with Enterprise Content Integration

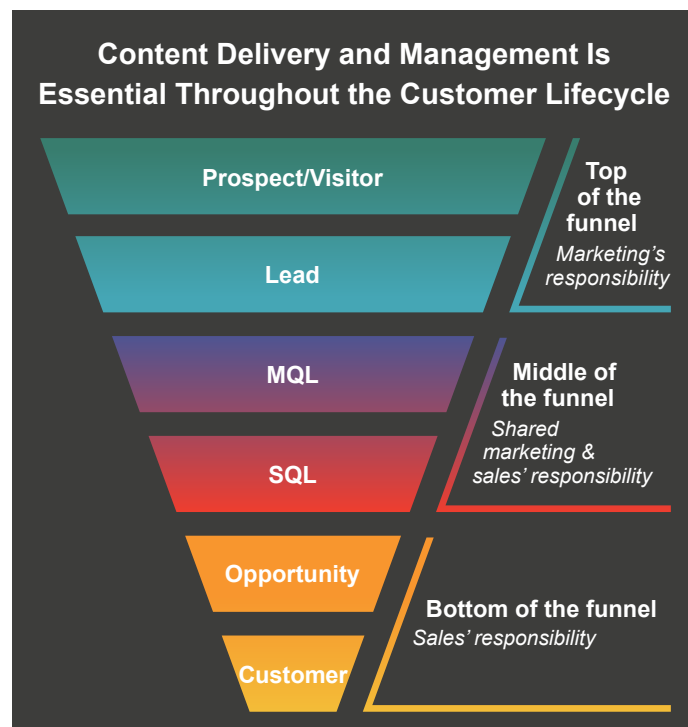
The investment of both time and resources that organizations make in their Salesforce implementations is substantial. Any project that can enhance value and increase payback from that investment should get serious attention. Thus, the integration of content management solutions must be thoroughly considered as a means of increasing the adoption and use of CRM. This functionality added to the sales cloud automates more of the regular and recurring tasks that sales and client-facing teams perform every day.

Support for the Entire Prospect/Customer Lifecycle in a Single System

The benefits of integration extend to all phases of the prospect/customer lifecycle, supporting the end-to-end marketing/sales process. Ensuring delivery of the right content is critical to program success; Eccolomedia, a San Francisco-based content agency, says 48% of buyers use 2 to 5 content² pieces during vendor marketing efforts.

There are many benefits that are derived from this improved process. They include:

- Fewer errors, since sales and support teams no longer have to guess which content is appropriate
- Increased efficiency, because employees don't have to search among multiple repositories for the right content
- Organizational consistency that delivers a better experience for customers in two ways:
 - › they receive the right content the first time
 - › interactions with the company are consistent over time
- Reduced employee frustration thanks to an integrated approach



Benefits for the Management Team

The management team also benefits from the integration of ECM and Salesforce in many ways. With consistent tracking and delivery of content within the CRM system, it is now possible to analyze customer outcomes and how the content impacted those outcomes. Management teams can either change what content is delivered in a specific situation, or update/create content that is better suited to the scenario and provides better outcomes. The ability to analyze data and drive content decisions from actual information is a powerful tool that few organizations currently have access to. This type of analytical decision making drives next-generation business processes, in addition to improving current results.

Management teams can leverage this solution to identify specific customers with old or obsolete versions of content that needs to be replaced or updated. Rather than do a blanket delivery of new content or documents, this can now be done strategically, eliminating unnecessary customer interactions that can be frustrating for them. Tracking and managing document delivery is also critical in industries such as government, financial services, insurance, utilities, and oil & gas, which require proof of delivery for specific transactions.

ECM is also essential for helping organizations meet compliance mandates such as HIPAA, FINRA, and ISO 9000.

There are also many specific demands on content delivery and tracking for other industries. For example, in property insurance, state regulators often require that notice of cancellation or non-renewal of policies has documented delivery. And financial services organizations have content -- such as changes to terms and conditions or legal notices about accounts -- that may also require documented delivery. In addition to mandates, though, empowering sales and customer service with definitive information about what has been delivered to the customer will improve the level of perceived quality and responsiveness of the organization to customer inquiries.

“Content” Includes Many Different Types of Material

One important aspect of project design for ECM and Salesforce integration is to ensure that the organization considers “content” in its broadest description. A starting point may be to make brochures and customer-facing product documents a focus of the integration project. But this is by no means a complete view. The goal of the project design must be the inclusion of all possible content within the CRM system to empower all customer interactions. Taking this holistic approach is essential to ensuring that the optimum value of the project is realized, and that all of the business benefits are gained.

A good way to structure this comprehensive approach is to identify all the internal roles that interact with the CRM system, and then document all the content, regardless of type, that these employees use in their normal routines. This process will provide the overall list or database of content that should be digitized; specific content types should then be prioritized

for different phases of the project. It is also important to incorporate into the database any new content that is developed to ensure it is added at the appropriate time. For example, certain vertical industries will have new or changing compliance or legal requirements that result in new documents or content. These items can be easily added to the database for inclusion at the appropriate time.

The integration of ECM and Salesforce typically includes these common documents:

- Marketing collateral/brochures
- Financial or account statements
- Invoices
- Terms and conditions/contracts
- Operating guides/videos
- Trouble tickets
- Shipment notifications
- And many others



In addition, a comprehensive plan must include content contained outside of the CRM system that resides in key enterprise applications. Limiting the solution to just the content that is stored in Salesforce is shortsighted. Further, many of the documents listed above are delivered by applications that are built on key enterprise platforms. As an example, applications written on SAP platforms may be the source of inventory, financial, or other critical information. The same is true of applications written on Microsoft's business platforms. Ensuring that the content management system can automate the delivery of key content into Salesforce from both SAP and Microsoft enterprise platforms is essential to the longer-term success of this type of project. It is also worth noting that utilizing the latest content from these enterprise platforms ensures that the information delivered to the customer is accurate and up to date. It is also a simpler process from an operational perspective.

Integration of Content Management and Salesforce Benefits Service Organizations, Too

The link between the “service cloud” and the “sales cloud” is a fact of life. And the need to integrate content management and provisioning for the service personnel is an important part of the overall Salesforce/ECM integration project. As many Salesforce implementations provide deep interaction between the sales and service teams, extending a consistent approach to content management and delivery for the two groups provides greater efficiency and more intelligence about the customer. It also improves the handoff from sales to service. Service employees can quickly and easily see what content has already been delivered, avoiding duplication that may be annoying to the customer.

A Salesforce/ECM solution also provides a platform for the simple delivery and management of content that is specific to the service function. This content will benefit from better management and delivery systems. Using an automated system, it becomes possible to ensure that updated or new service documents are immediately provided to all service employees. Or, any changes to existing service processes can be broadcast as soon as they are identified and new fixes

developed. The integration of service content into the CRM system will also provide real benefits for any dealers/resellers/partners, as the new or improved service content can be delivered proactively and immediately to third parties as well.

Large Oil & Gas Company Lifts Productivity, Lowers Costs

A large, enterprise-class oil & gas company required better processes for timely and appropriate delivery of its sales content. The project started as a single sales solution but grew into a project to develop an enterprise repository platform with extended ECM. This resulted in a single version of content “truth.”

The content had to support three distinct workspaces within the firm: opportunities, quotations, and customer engagement. The goal of the project was to streamline the ability to provide the right content, from initial contact through customer management, with a single repository that was integrated with the firm’s Salesforce implementation. The content repository had to be able to provide not only sales/marketing collateral, but also contracts, terms and conditions documents, and other financial content that the customer would require.

Deploying OpenText™ Extended ECM with Salesforce provided several early benefits for this oil & gas company. The gain in sales productivity was the most immediate benefit. Sales teams were able to do more useful work as they spent less time searching for and reviewing potential content for a specific selling or customer service interaction. There was also a positive perception among sales staff that the new system simplified their daily work. From a corporate perspective, the benefit that received the most attention was the cost reduction for content management. In addition, digitizing the content allowed greater leverage of existing assets, and that delivered greater ROI for content creation.



Summary

The more broadly a CRM solution is embraced, the greater the benefits and the ROI. One way to make Salesforce more engaging and useful is to integrate it with enhanced content management capabilities. This functionality provides marketing, sales, and support teams with a far simpler and more effective method of delivering key documents and reports to prospects or

customers in exactly the right context. For sales and client-facing teams, it saves time wasted trying to figure out what content is appropriate, as well searching for that content. Integrating ECM with CRM makes it easy to both deliver and track that content.

Maximize Salesforce ROI with Extended ECM

OpenText Extended ECM for Salesforce operates in deployments that include on-premises, cloud, or hybrid environments, making it the ECM backbone for many global companies in various business-critical applications. OpenText Extended ECM for Salesforce improves the overall customer and user experience, while increasing productivity and insight by equipping all customer touch points with a complete view of data and content. The Extended ECM platform also allows for inclusion of data and content from—or to—additional leading applications such as ERP or HR systems, providing a holistic view and ensuring efficiency by enabling collaboration in context of the entire process.

[Learn more about the benefits of Extended ECM for Salesforce.](#)

1 <https://www.opuscapita.com/blog/2016/the-5-major-costs-of-poor-document-management>

2 <http://eccolomedia.com/eccolo-media-2014-b2b-technology-content-survey-report.pdf>

MADISON LOGIC



257 Park Avenue South
New York, NY 10010
Phone: 646.937.5800
madisonlogic.com

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