



# Sales Enablement for Salesforce Sales Cloud

A Salesforce feature offered by KPMG





# Sales Enablement

- **Helps sales reps onboard fast from anywhere**
- **Helps them manage business opportunities efficiently**
- **Improves sales reps sales skills across the board.**

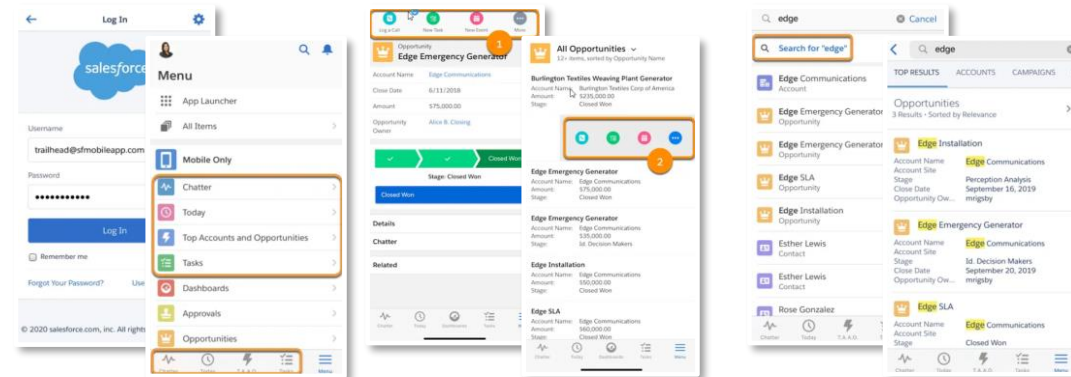
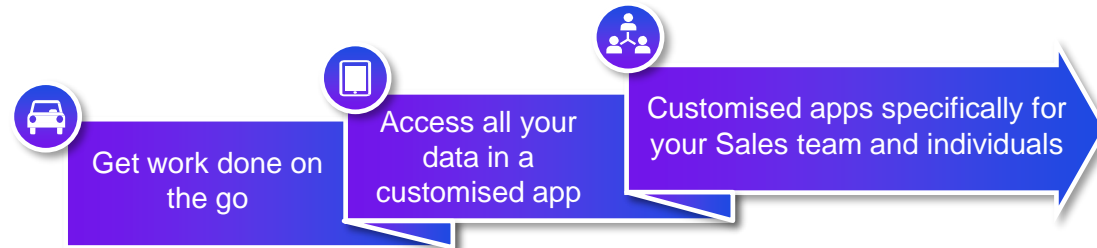


# Sales on Mobile

Helps you getting work done on the go, between customer meetings, while waiting for a flight or when you are in line for coffee

## Keep track of valuable client data?

Annoyed that you lose connection on your PC while on the run or lose track of notes while working with pen and paper? Salesforce gives you customised functionality at your fingertips with the Sales on Mobile app. All the functionality you know from the browser application, on the go.



The enterprise mobile experience gives you easy overview of key information such as current events, agendas, tasks and records for sales reps on the go.

The mobile app can be customised to your sales team's specific requirements, and individual users can edit the layout of their personal Salesforce app, so it is tailored to your business needs. Even when losing cell connectivity or WIFI, you can enable caching and do your editing offline to stay productive during your metro commute or flight.

Available for iOS and Android devices and is included with all Salesforce orgs.

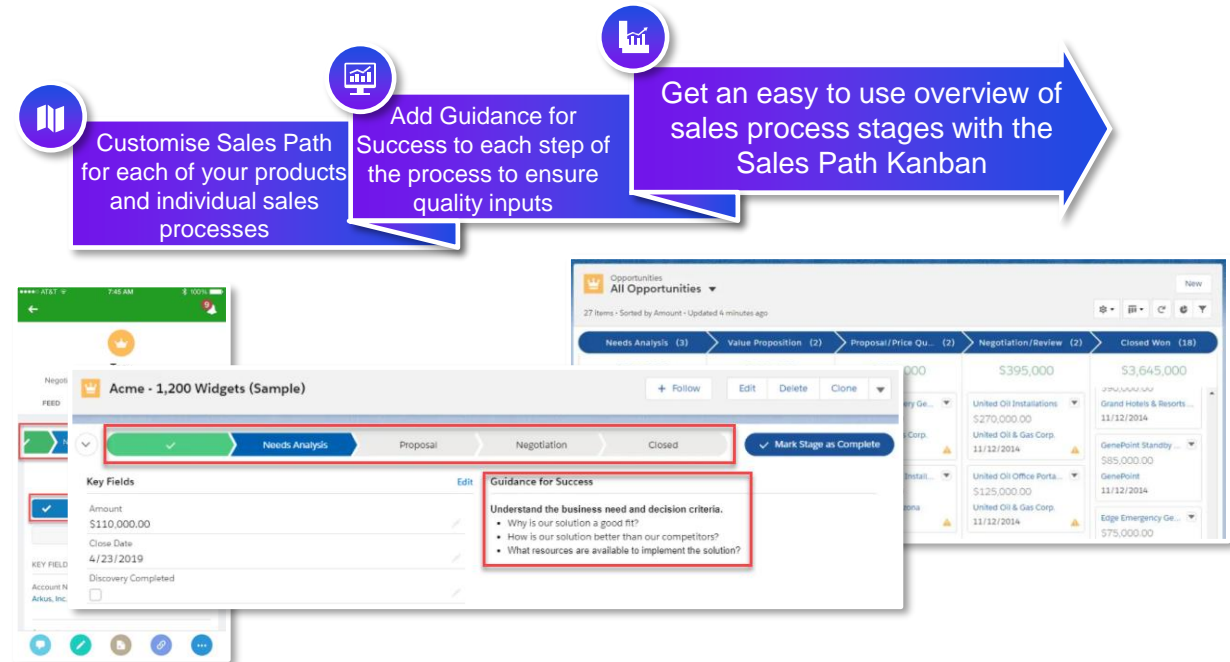
Benefits	High	Estimated effort	Low
Data quality & compliance	● ● ●	Data quality & compliance	● ● ●
Time reduction & efficiency	● ● ●	Time reduction & efficiency	● ● ●
Improved customer service	● ● ●	Improved customer service	● ● ●
Scalability	● ● ●	Scalability	● ● ●

# Sales Path

Boost productivity and ensure successful registration of data from fresh lead to successfully closed deal

**New to the company and the sales process or need to roll-out a new and updated sales process for a specific product?**

Ensure ease of use, boost productivity and help your sales reps gather complete data with Salesforce Sales Path.



The Sales Path can be designed to fit your specific sales process and help guide sales reps – new as well as old – in how to complete the process with helpful descriptions of each step and highlights of key features and processes.

Sales Path is available on Accounts, Contacts, Leads, Opportunities, Service appointments and many more objects and features of Salesforce, and each Path can be customised and updated to fit specific process needs. Sales Path feeds sales lead and opportunities into the Kanban view, where each lead can be viewed categorised based on the defined sales process steps.

To get the most out of Sales Path, it is available on the Salesforce desktop and mobile app, to help reps through the sales process even on the go.

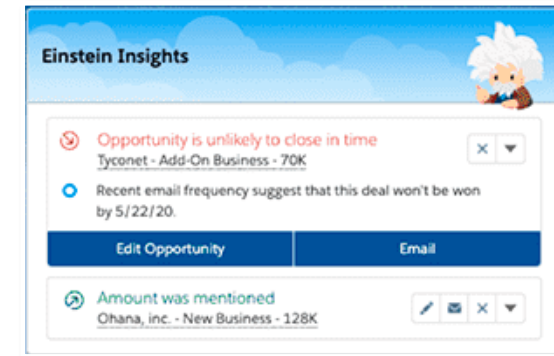
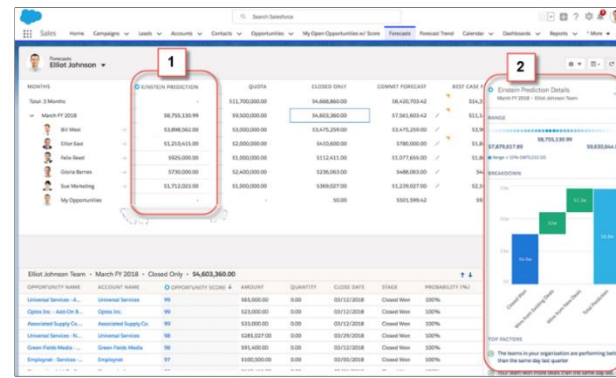
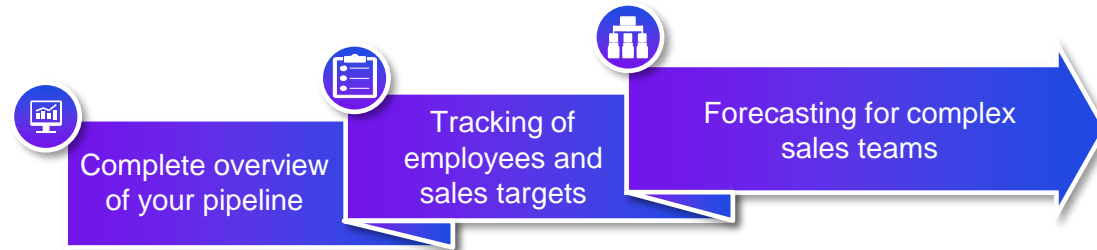
Benefits	High	Estimated effort	Med
Data quality & compliance	● ● ●	Data quality & compliance	● ● ●
Time reduction & efficiency	● ● ●	Time reduction & efficiency	● ● ●
Improved customer service	● ● ●	Improved customer service	● ● ●
Scalability	● ● ●	Scalability	● ● ●

# Sales Forecasting with AI

If forecasts are off, the company faces challenges that affect everything from pricing to product delivery to the end user

The main purpose of sales forecasting for all organisations and businesses is to answer the questions: How much and when?

Meanwhile, if forecasts are on point, the company can make better investments and know where to put in an extra effort.



Salesforce Sales Cloud helps forecasting revenue by giving you:

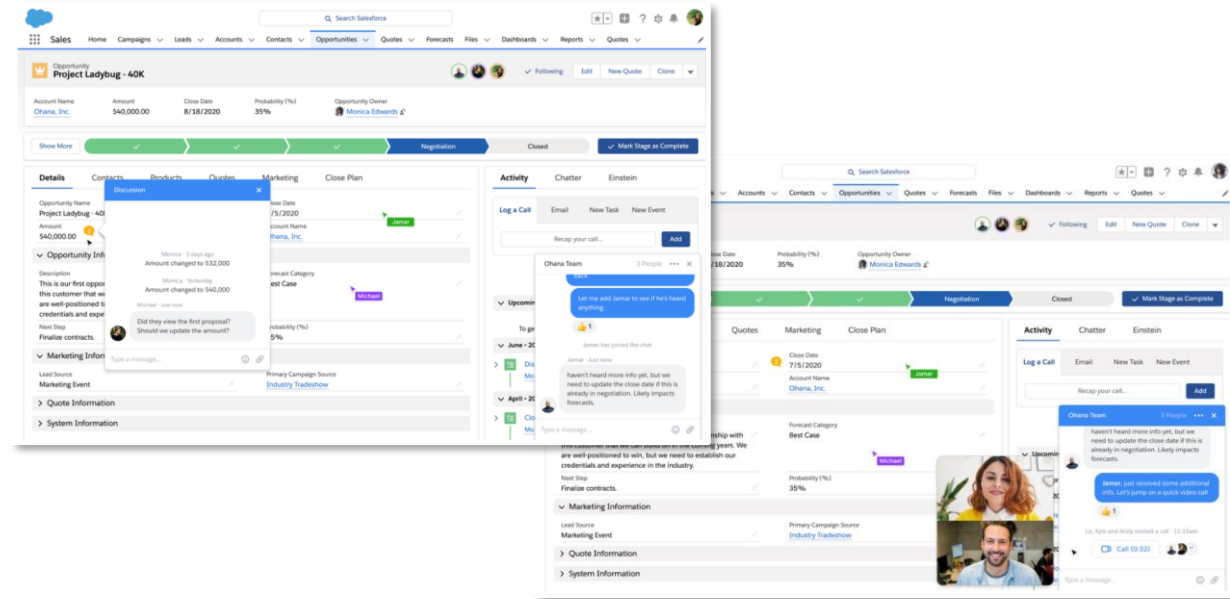
- An accurate view of your entire business: Comprehensive forecasts in Salesforce come with a complete view of your pipeline.
- Tracking of your top performers: See which reps are on track to beat their targets with up-to-the-minute leader boards.
- Forecasting for complex sales teams: If your business has a complex sales organisation, Salesforce can help. Overlay Splits allow you to credit the right amounts to sales overlays, by revenue, contract value and more.

There are many features that can be included in your Sales Forecasting to suit your organisation – reports and dashboards to highlight where the business challenges are, or real-time status of sales and support teams. Guidance from AI to provide an objective, unemotional point of view to your sales reps by providing alerts to opportunities, etc. This allows your reps to have their own personal data scientists.

Benefits	High	Estimated effort	Med
Data quality & compliance	● ● ●	Data quality & compliance	● ● ●
Time reduction & efficiency	● ● ●	Time reduction & efficiency	● ● ●
Improved customer service	● ● ●	Improved customer service	● ● ●
Scalability	● ● ●	Scalability	● ● ●

# Instant Message and Video Chat

Having a hard time collaborating over records, processes or new joiners? This is now a thing of the past with Salesforce instant Message and Video chat!



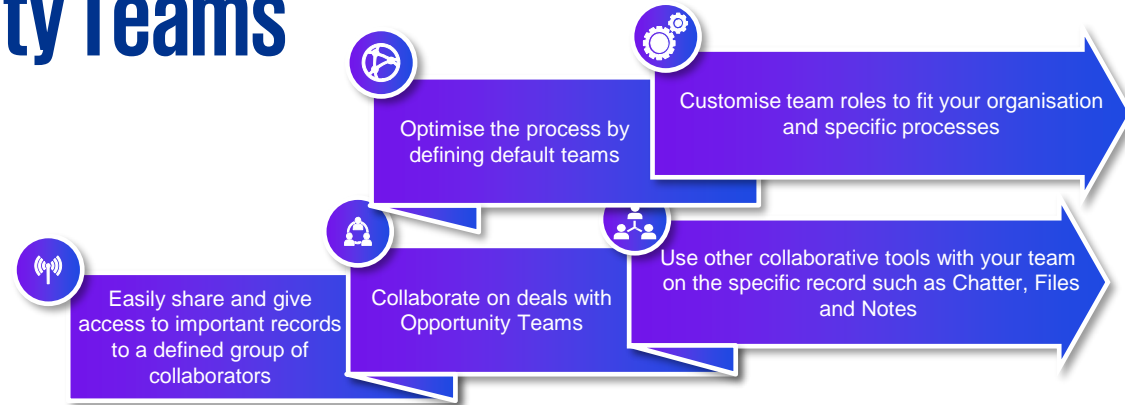
This feature enables you to initiate conversations quickly and directly with co-workers through the Salesforce platform. You can show where to fill in information, how to proceed in processes and more by allowing colleagues to see your mouse and how you fill in information. This feature also allows you to connect via video and voice making remote meeting ineffectiveness a thing of the past.

On-boarding can also be done remotely without the need for remote screen sharing software, since you can launch the feature directly through your org – to host webinars or live classes showcasing various parts of your salesforce org.

Benefits	Med	Estimated effort	Low
Data quality & compliance	● ● ●	Data quality & compliance	● ● ●
Time reduction & efficiency	● ● ●	Time reduction & efficiency	● ● ●
Improved customer service	● ● ●	Improved customer service	● ● ●
Scalability	● ● ●	Scalability	● ● ●

# Account & Opportunity Teams

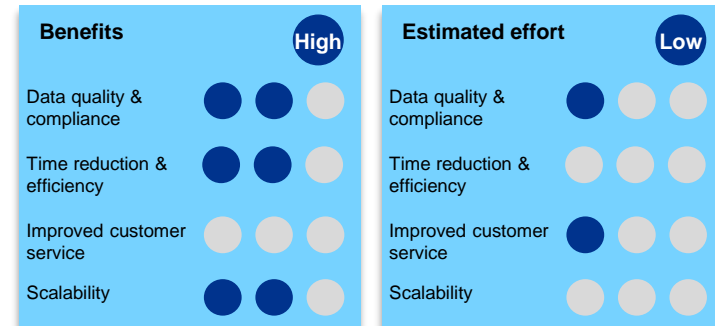
**Account & Opportunity Teams** is a powerful collaboration tool on the Sales Cloud platform. It is used to open up access and share records with selected users and to work together to pursue opportunities or manage accounts. Users can define their own default teams and add the entire team with a single click. Opportunities can inherit the Account Team of the related Account.



Account Team		⚙	↺	Add Default Team	Add Team Members	Team Member Access	Remove All Members
3 items • Sorted by Team Member, Last Modified Date • Updated a few seconds ago							
Team Member ↑	Team Role						
1		Pre-Sales Consultant	▼				
2		Executive Sponsor	▼				
3		Account Manager	▼				

As the owner of an Account, you can add colleagues or external partners to the Account Team to open up access to the Account and its related Contacts and Opportunities. Each member can be assigned a specific role and access level. The Opportunity Team is used to pursue certain opportunities together. An example of an Opportunity Team could be:

- The Account Manager
- A Sales Rep
- A Product Expert
- An Industry Expert
- An Assistant



# Definition of benefits and effort estimates

Benefits gained and efforts required to develop and implement the solutions and features are based on previous projects of a similar nature. Based on the collective score, each feature is assigned an overall high, medium or low score to provide the reader with an overview of ease of implementation vs. benefits for the future organisation.

## Benefits

High

Data quality  
& compliance



To what extent does the feature or solution comply with data quality requirements and general compliance and regulations.

Time reduction  
& efficiency



To what extent can the implementation of a feature or solution reduce time spent on a task or optimise the current practice to make the process more efficient.

Improved  
customer service



The extent to which the feature or solution can help improve existing customer service processes and practices.

Scalability



The extent to which the feature or solution can be used across the client's Salesforce organisation across multiple objects and processes.

## Estimated efforts

Med

Time



Estimate of time required to implement the feature or solution.

Resources



Estimate of resources required to implement the feature or solution.

Complexity



Based on a standard Salesforce instance, how complex is the implementation of the feature or solution.

Sponsorship



The extent to which client sponsorship is required to successfully implement and embed the feature or solution in the client's organisational culture.



# Want to hear more?

**Our experts are ready to help if you are interested in hearing more about how these features could benefit your business.**

## Contact us

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