

A photograph of three business professionals in a meeting. A man in a white shirt is leaning over a woman with glasses on the left, and another woman with blonde hair is smiling on the right. They are gathered around a table with a laptop and a glass carafe of water.

Salesfive

**Salesforce for
Professional Services:**

**How Salesfive successfully
connects departments**

Professional services providers benefit
from digital customer management in several ways.

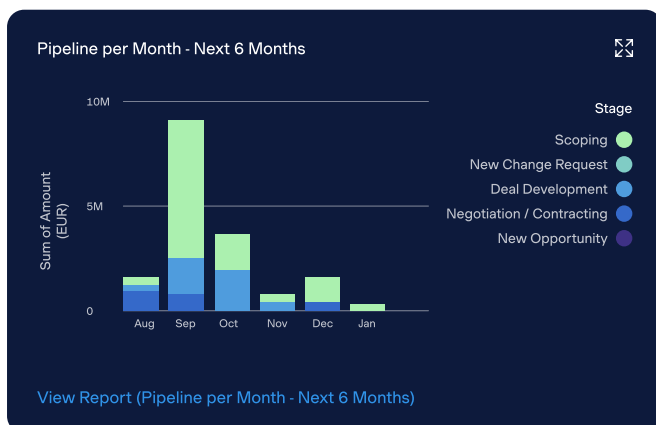
Everything at a glance

Professional services providers - from management consultancies to auditing firms - are often structured in a similar way with separate departments for sales, marketing, project management, finance and HR. If these departments operate in isolation from each other, this leads to data silos and a high organizational effort, which has a negative impact on efficiency. If you are also confronted with such a situation, we recommend this white paper. In it, you will learn how we, as a professional services provider, have successfully networked our departments and at the same time digitized our customer management with the Salesforce Sales Cloud. We also use specific best practices to show you how we have managed to maximize our sales and save costs at the same time.



Introduction

In view of rising costs and increasing competitive pressure, companies - and certainly not professional services providers - cannot afford inefficient administrative structures. In our experience, these can be completely avoided by digitizing customer management. We have implemented this by using a customer relationship management (CRM) system as a central communication platform and have since benefited from seamless collaboration between our departments and teams. The entire customer life cycle is seamlessly mapped - from initial contact to the sales process, project planning and implementation, right through to invoicing. This means that the entire customer journey is documented precisely and comprehensibly and everyone involved has a complete view of the customer. In turn, management has an up-to-date overview of current and upcoming projects, employee workload and the sales funnel at all times. The back office is also relieved as all data is available centrally in one system.



The digitalization of customer management in practice

We, the consulting company Salesfive, are a prime example of how professional services providers can benefit comprehensively from the digitalization of customer management with a CRM system. Since our foundation in 2017, we have consistently focused on efficient and lean processes. We introduced the Salesforce Sales Cloud as a CRM system at an early stage and have gradually expanded its use over time. We also

use the software flair.hr for HR management, Conga for contract management, JustOn for invoice management and Salesforce Marketing Cloud Account Engagement for marketing. These solutions are seamlessly integrated into the Salesforce Sales Cloud, which ensures smooth data exchange and optimized processes. For us, the Salesforce solution is the hub that bundles all information centrally and forms the foundation for lean processes across departments.

Marketing: As soon as a new contact is made, for example via a form on our website, the data entered is automatically transferred to Salesforce and the interested party automatically receives a confirmation of receipt for their inquiry. At the same time, a task is created in the Sales Cloud and the lead owner is asked to contact the prospect. At the same time, all sales employees receive information about the new lead in a Slack channel. In addition, the new contact is assigned to a targeted campaign in Salesforce depending on which website they visited or which form they filled out.

Sales: In Conga, we have created templates for data processing agreements (DPAs), service or project contracts and non-disclosure agreements (NDAs), for example. These are automatically filled with the customer data stored in Salesforce. The draft contract is then signed online by the responsible persons in our company and by the customer using the Conga Sign app and finally stored in the Salesforce solution at the customer contact.

HR: As part of the recruitment process, we record applicant data in flair.hr and thus have a complete overview of the candidate pipeline at all times. We also update our employees' data in the software solution, for example after an internal job change. All personnel documents are also stored in flair.hr and vacation and sick days are recorded. Contracts are sent and signed via Conga Sign, just like in sales. For the smooth onboarding and offboarding of employees, we have created corresponding workflows in the HR software that are activated as required. Salesforce automatically sends the integrated tasks to the responsible employees. This means that only one person is entrusted with all HR tasks.

Staffing: Just one person is also responsible for sche-

duling our more than 300 employees. For this purpose, the number of hours per employee and project is recorded in the Salesforce solution. This is then analyzed to determine whether the respective person and their Competence Center are overloaded or underloaded. This allows us to identify free capacity and use it for further project planning. We also compare the resource utilization with the budgets of current and upcoming projects and can thus determine the expected resource requirements. In order to optimize resource planning within the projects, we analyze the usual working time consumption of the central roles such as project manager, senior or junior consultant and system architect. We also log non-billable time, for example in the pre-sales area, in our Academy or during internal meetings, and try to reduce this to a minimum.

Accounting: As the hours of all employees involved are recorded in the Salesforce Sales Cloud, as well as their hourly rates thanks to the connection to flair.hr, we can also streamline our accounting. To do this, we created a template in the invoice solution JustOn that automatically imports the customer data, the number of hours per employee in the project and the fee rates from the Salesforce Sales Cloud. This means that only one person creates all invoices, which are then approved by the project manager.

Higher outcome

The Salesforce solution is therefore our single source of truth, where all information is collected that leads to greater transparency and lower costs across departments and teams. It also makes a significant contribution to high customer satisfaction and long-term customer loyalty, which ultimately leads to an increase in sales. We also benefit from numerous other advantages by using the Salesforce solution. These include:

Higher efficiency: Our employees no longer have to manually collate information from different applications and colleagues. By bundling all relevant project data centrally, we can concentrate on the efficient planning and management of current and future projects.

Efficient mergers and acquisitions (M&A) management: We handle our company acquisitions and mergers smoothly within the Salesfive Group. All custo-



mers, projects and prospects are consolidated in the Salesforce solution and assigned to the responsible employees. This means that everyone involved knows who is responsible for processing requests for proposals (RFPs) and our sales team avoids internal competition.

Comprehensive real-time reporting: Last but not least, our management benefits from a high level of transparency. It has access at all times to current figures on sales and margins, current and upcoming projects, current employee utilization and the forecast. This comprehensive information is extremely valuable for strategic corporate planning

Closed Won YTD
by Opp Team Member with Split

Team Member: Full Name	Sum of Split Amount with Discount	Average Margin with Discount	Weighted Average Margin
A...	EUR 3,15M	46,6%	45,61%
A...	EUR 3,15M	44,6%	42,37%
C...	EUR 2,5M	51,7%	51,04%
F...	EUR 1,75M	57,6%	53,96%
B...	EUR 1,55M	53,2%	53,85%
J...	EUR 1,3M	52,8%	49,18%

No Partner Opps
[View Report \(Closed Won YTD\)](#)

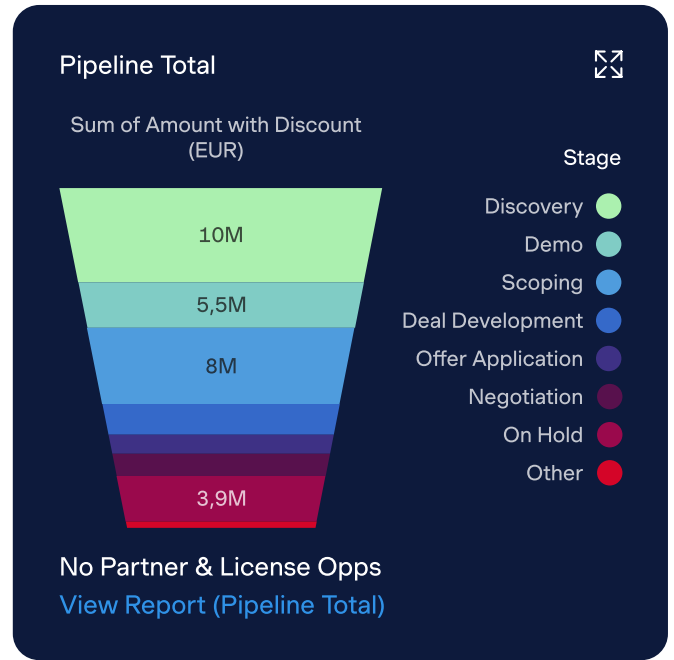
Salesfive is the reliable partner for the digitalization of customer management

With our many years of experience and the expertise we have gained from numerous CRM projects, we are a highly qualified partner for professional services providers when it comes to the digitalization of customer management. This is also proven by our more than 1,500 Salesforce certifications.

We support you throughout the entire project - from strategy and technology consulting and the proof of concept (PoC) to the design and implementation of the solution through to testing and final commissioning. During the course of the project, we merge your existing data from various silos and ensure high data quality with the help of a master data management concept developed in-house. This gives you the desired single source of truth, which enables your departments to work in a networked manner and offers everyone involved a 360-degree view of your customers. As part of the project, we also review your existing processes with regard to optimization potential and, of course, implement these digitally.

We also provide change management to ensure that your employees are involved in the project from the outset and are convinced of the benefits of the digital transformation. Of course, this also includes training and instruction in the use of the Salesforce solution as well as support. We ensure proximity to you with our twelve locations.

Reduce your costs and maximize your sales! Benefit from our expertise in the digitalization of customer management by introducing a CRM system.





Would you also like to...

- improve cooperation between your departments and thus efficiency?
- give all departments a 360° view of your customer to provide the best service offer?
- have a CRM structure that supports and accelerates the tasks of your departments?
- have a proven strategy to ensure your data quality at a consistently high level?

We know the challenges of medium-sized and large companies in the service and professional services sector from our own experience. We can bring this knowledge and the expertise gained from numerous implementation projects with customers to your digitalization project. Let us advise you now, without obligation, on what is possible!

Your direct contact to us



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Salesfive