Salesforce.com- The right technology for your business

What Technology Era are you working in?

Not sure? Let's see if we can help you decide.

Where's your data?

So, it's 2016, and I have to ask -- where's your data? Well, surely, you might respond with a logical "what data" response... Sales? Service? Warranty data? Billing? Inventory? Forecasts? Excel spreadsheets? Contracts? Marketing sheets, Email?... and so on and so on. Furthermore, where is your data physically -- i.e., servers, laptops, on-premise, hosted servers, Cloud, Or Hybrid?

Well, you're not alone. For most Businesses, critical data needed on a daily basis is dispersed among multiple applications, servers, data sets. And it's hard and time consuming to find. Worse yet, when you do find the data, is it the right data, and do you trust it?

How many Spreadsheets are you using to manage your daily needs?

Don't get me wrong, I love Excel, but caveat emptor -- let the 'user' beware! Specifically, did you create the spreadsheet, or did someone else? Was it tested? Are you using the latest version? Do you trust it? Oh and how much time do you spend each week maintaining, updating and emailing those spreadsheets? Now, multiply that number by the total number of salaried Professionals, and sit down -- before you fall down -- to see the true 'costs' of those myriad of spreadsheets. Clearly, they are costing you a lot!

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Bad Data is a big-time hindrance to your growth

How old is that Critical data?

There's nothing worse than bad data, but isn't old data really 'bad data'? Ask yourself 'how old is the data that you're relying on to make Business decisions'?

- one hour?
- one day?
- one week?
- one month?
- one quarter?
- or, is it 'Real Time'?

Well, it should be obvious that if it's not Real Time, then it's potentially 'bad data!

What is -- or are -- your Systems of Record?

OK, so this is a trick question as most Businesses have multiple Systems of Record, including:

- ERP -- or 'Back Office'
  Example : Oracle, SAP, JD Edwards, Dynamics, Great Plains, Dynamics, Quick Books
- Databases -- e.g., Access, SQL Server, Oracle
- Data Warehouse
- Excel spreadsheets -- dozens or even hundreds
- SharePoint
- CRM -- or 'Front Office'

And, while a single system of record is tough to ind, if it's more than a few, then they better be integrated, and the data better be in sync. Truth be told, new Businesses today aren't plagued by non-integrated legacy systems and disparate technologies, so that is attracting a lot of new Businesses to ind and select a single system that can do it all and scale when their Business grows.

Do you use Reports or Dashboards?

Sounds like a strange question, but Reports are a carryover from the 1970's where green bar paper Reports were the norm. But, unlike today's Filter-based Reports, every question had to be answered with a unique Report. With today's solutions, Reports -- and Filters -- are typically nothing more than Dashboard 'com- ponents' visible on all devices -- even Mobile. Today, Reports are oftentimes a means to an end. In other words, in the modern computing era, Reports are what you see when you drill down into a Dashboard component that 'just doesn't look right'.

Finally, How long do you have to wait for a new Report to be available to use?

Can you find any critical document that you need - in seconds?

If you're like me, on a daily basis you need to get your hands on any of the following documents:

- Proposals
- Quotes
- Contracts
- Workbooks
- Marketing Materials
- Customer and Prospect logos
- Templates
- Customer -- or Prospect -- documents provided as part of a deal or RFP

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And, how much time do you spend getting your hands on them? Finally, once you do find them, are they the latest version, and do you trust that you are using the most current -- and approved -- document?

How long does it take you to get things done?

Seriously, ask yourself the following questions:

- Are your methods mostly manual in spite of all of the IT your company has in place?
- How many emails, phone calls, and Voice Mails does it take to get things done?
- How many of you are still re-keying data into multiple systems?

Collaboration?

Well, if you haven't been pleased with either the questions -- or your responses -- then extrapolate to quantify how much more difficult is to collaborate -- i.e., either Team Selling or solving Customer Service issues quickly, efficiently, and at the lowest possible cost.

Can you run your Business from your phone?

It may sound crazy, but if the right solutions are in place, having Mobile access to all of the above data is nothing more than OOB -- Out of he Box -- functionality.

So, what Computing Era are you working in? Let's try to put that into perspective. Here's a simple matrix that I developed for Vertex's Salesforce.com Practice to see how we 'stacked up' using these questions and some simple met- rics. We have a saying – 'If it's not in Salesforce.com, it doesn't exist.' Consequently, other than our currently using Microsoft Office products and a simple Accounting system for Billing, we're on the right path.

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Technology Metric	1970's <=1	1980's 1-2	1990's 2-3	2000's 3-4	Current State 4-5	Technology Score
Where'Your Data						5
Laptops	1					
Network		2				
Servers			3			
Hybrid				4		
Cloud					5	
Spreadsheet Reliance						4
>=10	1					
8-9		2				
6-7			3			
<5				4		
None					5	
Age of Data						5
<+1 Quarter	1					
<_1 Month		2				
<_1 week			3			
<_1 day				4		
Real-Time					5	
Systems of Record						4
<12	1					
11-12		2				
6-10			3			
2-5				4		
One					5	
Document Storage						5
Manual Storage	1					
>5 Systems		2				
4-5 Systems			3			
2-3 Systems				4		
Single Repository					5	
Business Processes						4
Rekeying Required	1					
Manual Methods		2				
Semi Manual			3			
Automated Workflows				4		
Fully Integrated					5	
Collaboration						5
Manual	1					
Telephone		2				
Email			3			
Network				4		
Collaboration Tools					5	
Mobile Function						5
None	1					
Telephone		2				
Email			3			
Applications				4		
Full Functionality					5	
					Total Technology Fra Score	4.6

Conclusion

So, while I don't think this Survey is ready for Gartner's official review, I think it can raise some questions as to the 'Technology Era' you're working in – and, more importantly, what's possible.

So, assuming your computing environment isn't 'Current State,' what can you do? Here are some suggestions:

- Identify – and prioritize – the applications and processes that are not adding value
- Start looking at options to consider to move your computing technology into the 21st Century
- Build a Business Case to justify any recommendations that you make. Some companies have formal NPV, ROI, and/or Payback formulas, so you may have to do your homework. Companies like Salesforce.com have significant Customer Success Metrics that can be leveraged to provide a baseline in many cases.
- And, remember, Technology can only really help in a few key areas:
  - Grow Revenues
  - Reduce Expenses
  - Increase Margins

If you're like most companies, you won't have to work hard to develop a credible and defensible Business Case to 'move the needle forward.' But don't try to do too much. Best practices generally favor short, highly effective changes with measureable ROI. After that, let success breed success. But, time is money, so don't wait. Or, put another way repeat- edly at the Dreamforce Event – 'Speed is the new currency of Business!'

About Us

Vertex is a CMMi Level-3 IT consulting organization that engages with its customers at a strategic level and provides 'thought leadership'. Vertex's team of Solution Scientists craft innovative solutions, with a holistic view, that make businesses smarter. Vertex acts as an advisory partner, aligning its offerings with the business goals and objectives of its customers.

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