

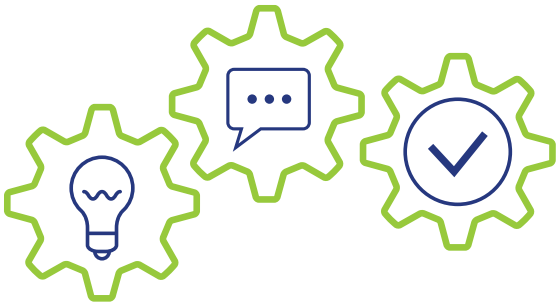
Buyer's Guide

Salesforce Users: Ask These 10 Questions Before Committing to a Document Generation Solution

You've already invested in Salesforce to improve your customer relationships and now you want to do the same for customer communications. Before you sign off on just any document generation solution, make sure you have the right answers to these ten questions.

1 Is this solution fully integrated with Salesforce?

Not a solution that's 'plugged into' Salesforce. Not a solution that lives outside of Salesforce. You want a solution that's fully integrated and part of the Salesforce environment – one that never requires your users to leave Salesforce to create, access or generate communications.



2 How easy will it be for my team to create customer-facing communications like proposals, quotes, contracts and customer service letters?

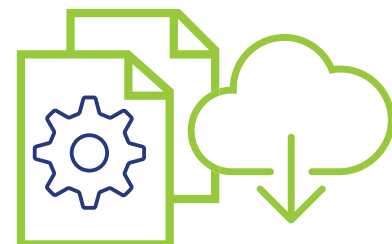
'Easy-to-use' is a critical component in your assessment, particularly if you want your solution to be widely adopted across the organization. Look for a simple 'drag & drop' interface that allows users to create communications in minutes. Your users should be able to easily access, personalize and edit branded templates without requiring help from IT. They should also be able to make in-document edits and pull from a library of pre-approved, locked down content. Again, if it's already in Salesforce – the tool your team uses every day – solution adoption will be a whole lot faster. And your Salesforce usage will increase as well.

3 Will this solution eliminate the need for cutting and pasting between Salesforce and the desktop?

To save time and frustration, choose a document generation solution that eliminates the dependency on desktop word processors and the need to cut and paste documents or upload attachments to Salesforce. Your optimal solution should be completely integrated in Salesforce and allow your team to simply drag and drop information from one single template. This will help you avoid costly errors, keep branding intact and save your team a lot of time.

4 Does this solution support both personalization and brand standardization?

Like you, we recognize that both are needed to deliver a great customer experience. Make sure the solution gives you the ability to create (and send) highly-personalized and professionally branded emails and attachments. Find a solution that supports a library of locked-down, shared content that users can easily drop into approved on-brand templates. Don't settle for a document generation solution that doesn't help you achieve compliance, maintain consistency across communications and resonate with each customer as an individual.



5 How well can the solution handle multiple versions of communications?

Forget old school editing techniques: users sending email attachments back and forth, tracking changes in word processing applications and working with multiple versions of the same communication. Get a solution that allows all parties to work from a single version of the same document. Bonus points if it tracks all the changes automatically for you in Salesforce.

6 How easy is it to create high quality, rules driven templates?

It shouldn't take a programmer to make a template. Your document generation solution should have a simple wizard-driven interface that enables non-IT users to create business rules without coding. Anyone should be able to create professionally branded templates in hours, not days.

Before investing in a document generation solution, ask if you can easily swap out logos or change merge fields in templates without starting from scratch. Also consider whether the solution can handle complex data models – like pricing and contracts – with ease and without the need to involve your IT department.

7 How easy is it to update templates when terms change?

When regulations change, or terms need updating in your templates risk can be introduced to your business while your template manager rushes to make updates across your template library. You need to control what templates are in use and ensure up to date terms are sent as soon as updates are made or you run the risk of your team using out of compliance templates. Look for a solution that takes the time intensive template updating process and simplifies it with a shared content model. Making updates once and having those changes filter throughout your template library not only reduces risk when updates are live in real time, but it benefits your bottom line ensuring favorable terms and compliant regulations are easily rolled out while giving time back to teams across your organization like legal, Salesforce admins, and sales.

8 Does this solution provide an audit trail?

Find a solution that gives you the ability to monitor and audit communications from a single source of truth. Your solution should allow you to automatically track changes during the full lifecycle of communications – from negotiations, to copy edits, to the final approval process.

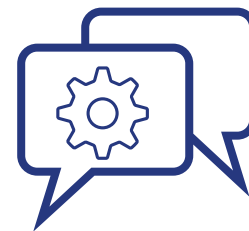
A final draft with all of your tracked changes should be accessible so you can see what changes were made and by which party along the way. Once finalized and sent, ensure your solution automatically updates this activity on the contact record. That way you will no longer need to manually attach communications or emails to those records. The process should be seamless.

9 How long will it take to be up, running and business-ready?

Choose a solution that was created with the business user in mind – one that can be implemented within days, not months. Opting for a browser-based editor that's pre-integrated into Salesforce will save you tons of time with both daily communications and implementation. And finally, look for a solution provider that has a track record of efficient implementation – either direct or through a partner – of enterprise-class that's proven to work across a multitude of industries.

10 Can I trust this provider to deliver ongoing value to my business?

Great customer communications are just part of the deal. Before you commit to a provider, take a hard look at the company. Do they have a solid reputation for serving demanding, large-scale organizations? Choose a world-class document generation provider who can scale to meet your needs in the long term.



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