**Sienna Quirk
Senior Director of Product Marketing, Smart
Communications**

#innovateUS2019

Agenda

1. A culture of transformation

2. Adjusting to changing business needs

3. Associa's steps for success

4. How SmartCOMM™ for Salesforce is helping Associa succeed

#innovateUS2019

**Colleen Burnsed,
Director of Salesforce Operations,
Associa**

#innovateUS2019

History of Associa

Private company owned by John Carona- former Texas State Senator

Started 40 years ago

Growth stemmed from acquisition

Many different office cultures and workflows

#innovateUS2019

MISSION STATEMENT

Delivering unsurpassed management and lifestyle services to communities worldwide.

COMPANY PILLARS

EMPLOYEE MORALE

CLIENT RETENTION

CLIENT GROWTH

PROFITABILITY

COMPANY VALUES

FS FAMILY SPIRIT:
We are a family. We treat each other with kindness, respect and encouragement.

CS CUSTOMER SERVICE:
We value our clients and understand that their success is our success.

I&A INTEGRITY & ACCOUNTABILITY:
We maintain the highest ethical standards and are accountable for our actions.

L LOYALTY:
We are steadfastly loyal to Associa, our leaders, our colleagues, and vice versa. Our hard work will be the mark of our devotion.

I&I INNOVATION & IMPROVEMENT
We innovate constantly and seek always to improve.

THE ASSOCIA BOOK

The Associa Book was created to help align our employees with the vision we promise our clients and to remind us to keep the most important principles in focus. Every Associa employee has an opportunity to define their unique role and the talents and passions they can put to work for our clients. Together we strive to live out our mission, our pillars and our values every day.

Without **Employee Morale** there would be no enthusiasm about client service and without that, we couldn't success at retaining our clients.

Without **Client Retention** we couldn't even begin to hope to retain new clients.

Without **Client Growth** how could we expect **Profitability** to keep us in business?

#innovateUS2019

What Sparked Our Change

Changing Business Needs

Technology Advancements
(*Innovation & improvements*)

Growing customer expectations
(*Quick and personalized*)

Increase Efficiency
(*Faster turnaround time*)

Reduce risk
(*Consistent branding, all branches should have the same foundation offerings*)

Improve Your Bottom Line

Associa's 2020 Vision

Standardized business model – create efficiencies across all business lines by leveraging integrated industry leading technology

Create world-class brand with an international presence

Best-in-class training and development both internally and externally.
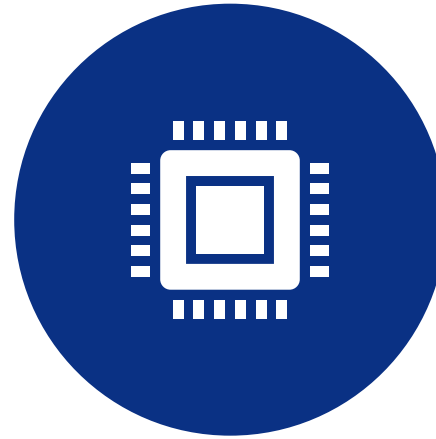
Obtain Best Place to Work

Sustainable corporation with $1billion in revenue

#innovateUS2019

Applying Vision 2020 to Our Sales Process

STANDARDIZED SALES
BUSINESS MODEL

BRING IN NEW
TECHNOLOGY

IMPROVE TRAINING
AND DEVELOPMENT

#innovateUS2019

Our Sales Change Management Process

- **Vision 2020 put into place**
- **Purchases Salesforce** *(client growth decline)*

- **Rolled out Salesforce**
- **New sales model; IMPACT.** *(client growth decline)*

- **Teach people Salesforce isn't going anywhere.** *(client growth improvement, company record on gains/growth rate %, & closure rate)*

- **Teach people to input key data into Salesforce.** *(client growth improvement, new company record on gains/growth rate %, and closure rate)*

- **Teach people how to get data out of Salesforce.** *(client growth improvement, new company record on gains/growth rate %, & closure rate)*

- **Goal to have best client growth in company history & expanding program to help capture full Employee Lifespan with Associa to assist with Retention**

2014   **2015**   **2016**   **2017**   **2018**   **2019**

#innovateUS2019

Phase 1: Proposal Automation

#innovateUS2019

The History of our Proposal Templates

Standard proposal template created

Standard proposal turned into custom proposal per branch & hired proposal writer

Proposal writer creates all client proposals. Discovered SmartCOMM for Salesforce

Roll out SmartCOMM for Salesforce to replace all basic proposal templates with 1 standard proposal template & allow individuals edit & generate on demand

2016   **2017**   **2018**   **2019**

#innovateUS2019

The Proposal Template Process

- BD creates opportunity > Click 'Request Proposal' on Opportunity> Fill out Custom Object Record (due date, pricing, special requests, etc.)

- Email notice is sent to Proposal Writer> Proposal writer then finds correct template and plugs in all of the information

- Proposal writer saves proposal in opportunity & chatters BD.

- Process is complete unless BD requests additional edits.

40+
Templates

600
Requests to Date

7
A Day / 35 a Week

24
Hour Minimum Notice

3-5
A Week are Complex RFPs

#innovateUS2019

Efficiency

Reduce # of Templates

Increase Efficiency

Brand Integrity

Single Source of Truth

Salesforce

Increase Customer Satisfaction

#innovateUS2019

Improved Aspects

- Edit and generate proposals inside Salesforce

- Create proposals on demand – no waiting!

- Edit document parts to customize client requests:

  Opening Letter • Offerings Page • Images

- Use existing CRM data to fill in data automatically

- Proposal delivered in PDF format

  Print • Email

#innovateUS2019

Future Growth

Contract Negotiation / Contract Management

Replace Insurance department Conga template process

(improve bottom line & efficiencies)

#innovateUS2019

The SmartCOMM for Salesforce Helped Solve for:

- Inefficient processes that lead to slow customer acquisition / time to market
- Ability to scale with the pace of customer acquisitions
- Error prone manual process
- Risk to brand integrity
- Inconsistent customer communication
- Expensive resources spending time on menial work
- Current solution is not sophisticated or user friendly enough

#innovateUS2019

The SmartCOMM for Salesforce Difference

Streamlined Communication Management: Multi-brand, multi-language, multi-channel communication from a single template

Complex Logic Made Easy: Complex templates that incorporate videos, charts, multiple attachments, and more with drag and drop logic are easily created by business users

Simple Template Management: No need for code or expensive resource to update templates. Shared content and flexible templates mean fewer templates to manage overall.

Interactive: Create, personalize, collaborate, and negotiate with a single solution

Flexible Storage: design and produce rich documents in Salesforce with the flexibility to control those documents in house, behind your own firewall

#innovateUS2019

Success Check List

✓ Align your project with corporate goals and initiatives

✓ Gain executive buy in

✓ Create a culture of adoption - If it's not in Salesforce it doesn't exist

✓ Identify what success looks like –understand the process today so that you'll be able to articulate and show improvements

✓ Factor in time for training and roll out

✓ Remember it takes time – transformation doesn't happen overnight. You need time to build, roll out and for your teams to adopt to change

#innovateUS2019

Questions?

#innovateUS2019