Improving Sales Efficiencies with Modern Document Generation in Salesforce

Sienna Quirk, Senior Director of Product Marketing at Smart Communications

Agenda & Introductions

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

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

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.

What Sparked Their 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.
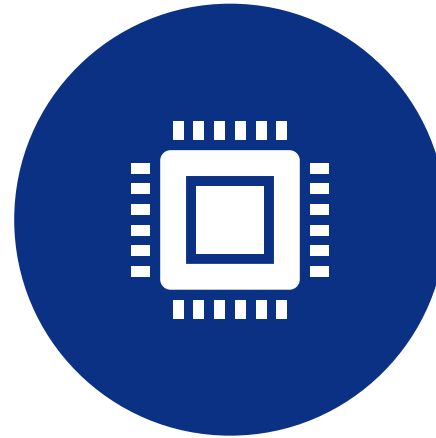
Obtain Best Place to Work

Sustainable corporation with $1billion in revenue

Applying Vision 2020 to Associa's Sales Process
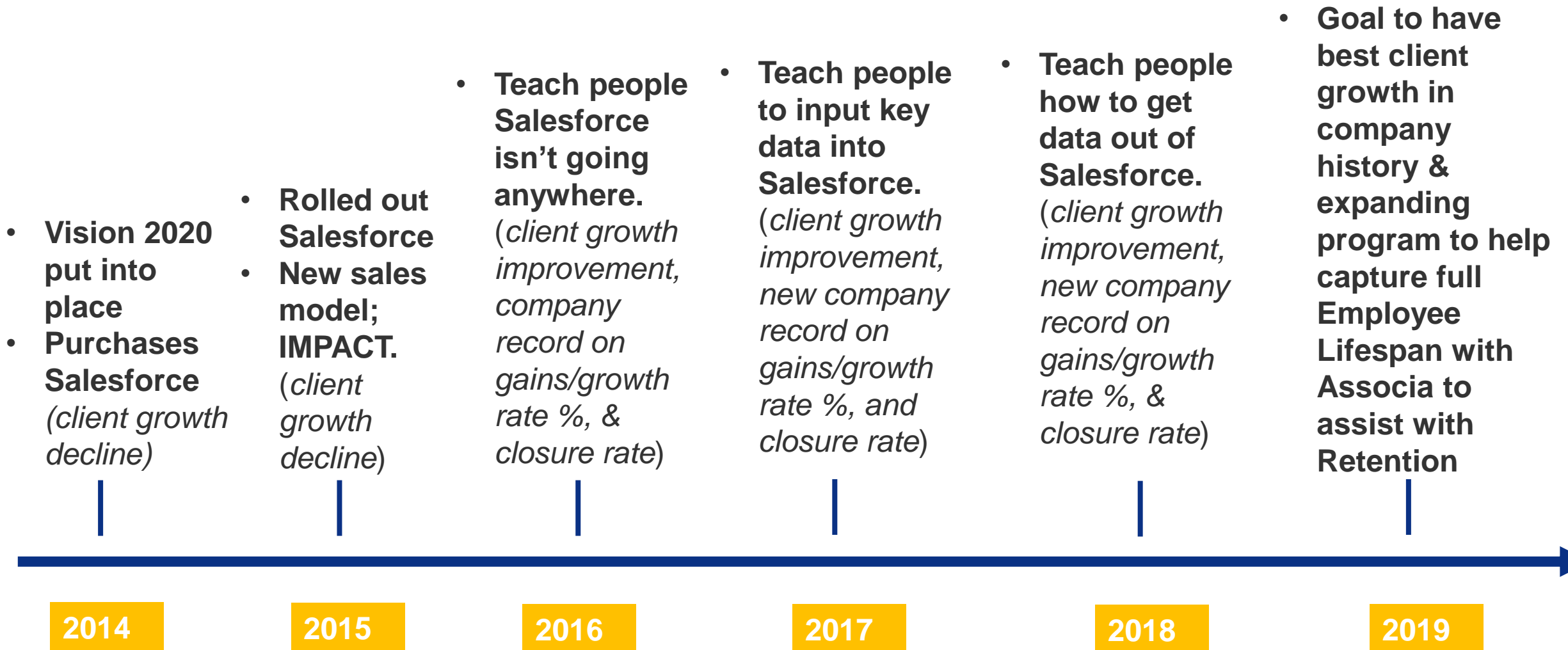
STANDARDIZED SALES BUSINESS MODEL

BRING IN NEW TECHNOLOGY

IMPROVE TRAINING AND DEVELOPMENT

The History of Associa's Proposal Templates

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

Proposal writer creates all client proposals. Discovered SmartCOMM for Salesforce

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

Standard proposal template created

2016

2017

2018

2019

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

Efficiency

Reduce # of Templates

Increase Efficiency

Brand Integrity

Single Source of Truth

Salesforce

Increase Customer Satisfaction

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

Future Growth

Contract Negotiation / Contract Management

Replace Insurance department Conga template process

(improve bottom line & efficiencies)

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

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