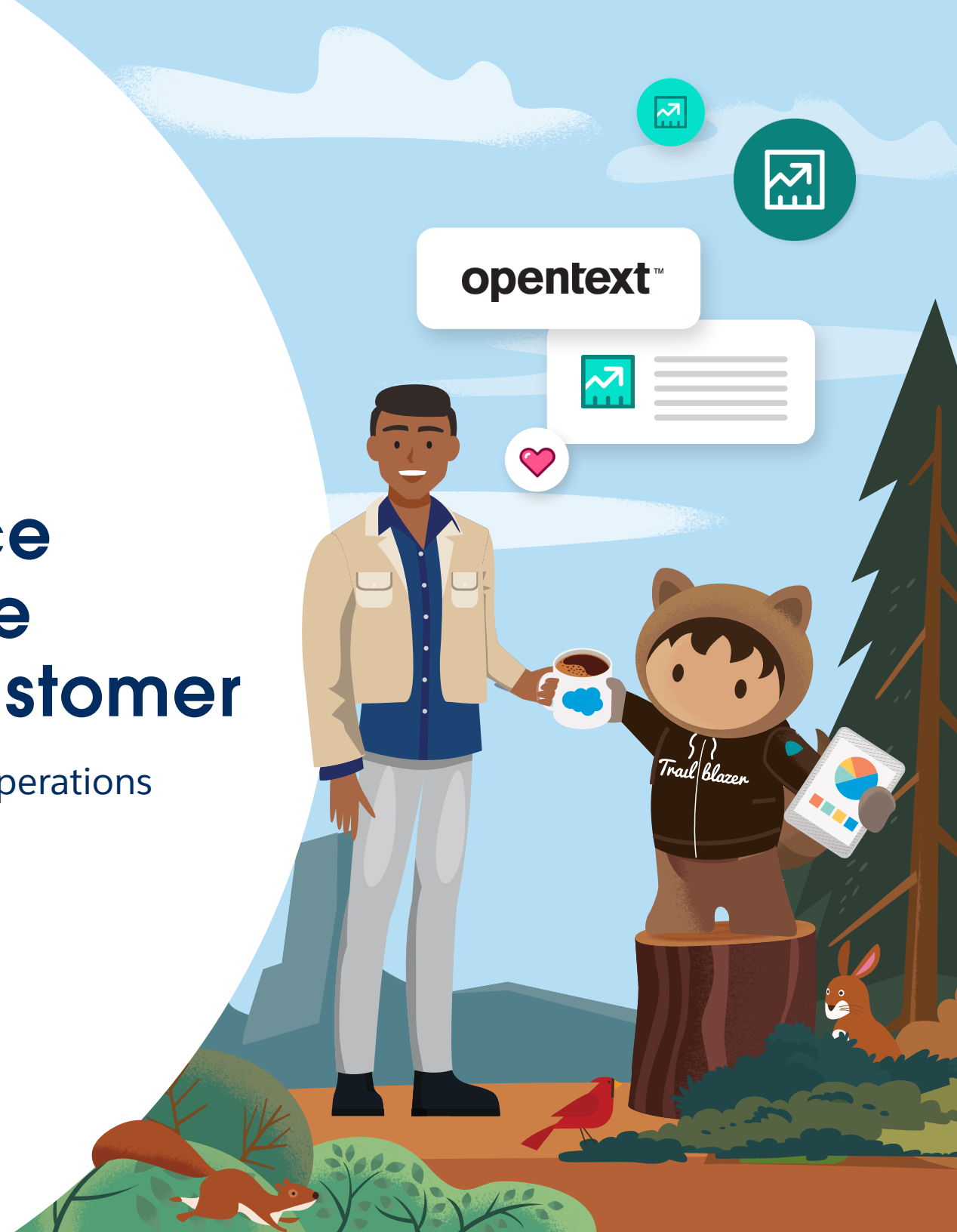




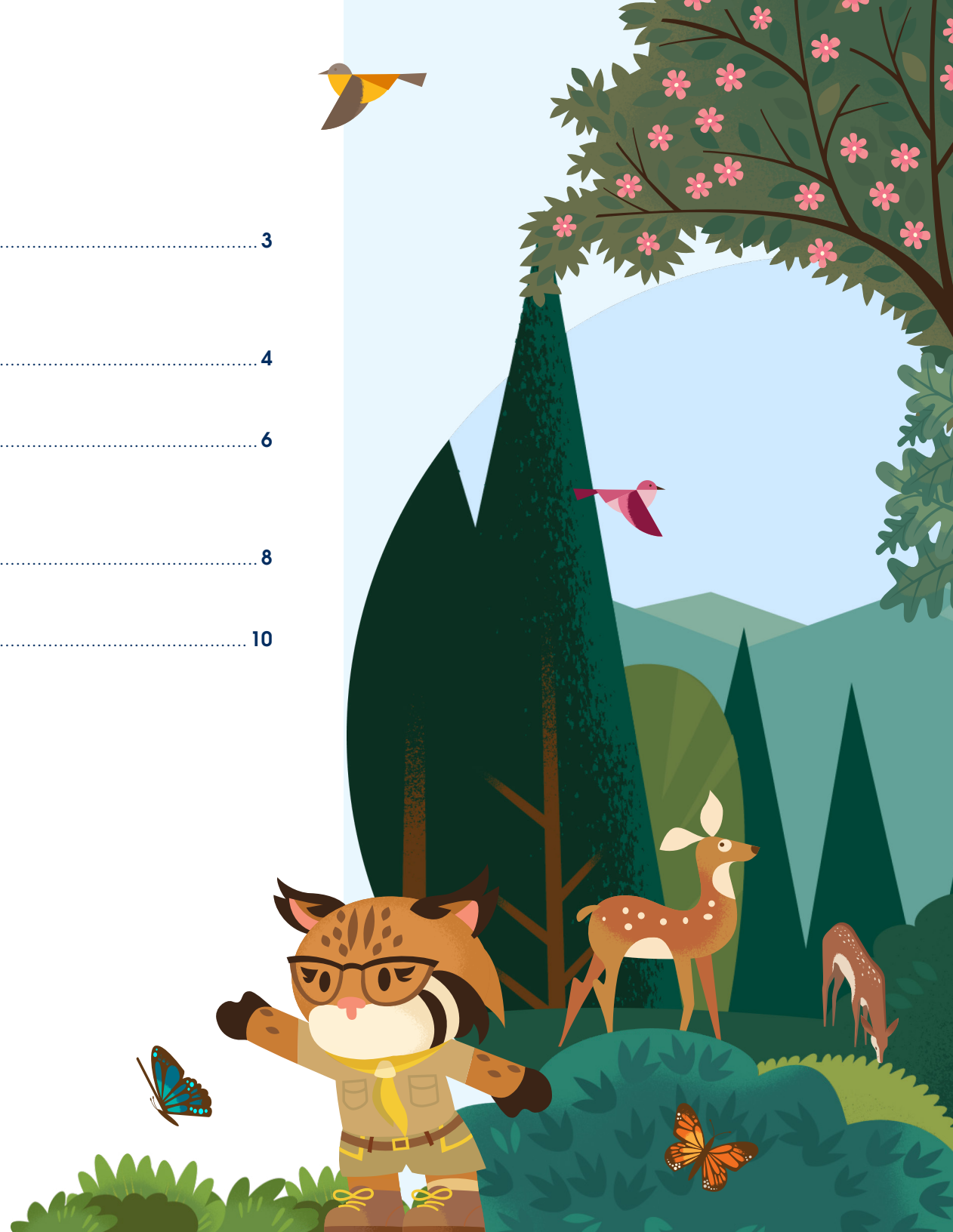
# Optimize the Sales Experience with a Complete View of Your Customer

4 Best Practices for Salesforce Operations



# Contents

Adapt Sales to the Digital Era with Salesforce .....	3
Maximize Salesforce Efficiency with Document Integration and Automation .....	4
Enhance Information Reliability and Security .....	6
OpenText and Salesforce: Next-level Sales Performance .....	8
Get Started Today .....	10





# Adapt Sales to the Digital Era with Salesforce

As the digital landscape for sales teams has shifted over the last several years, so too have consumer expectations. Customers are used to the convenience and speed of information and digital transactions in their day-to-day lives, especially as emerging artificial intelligence (AI) technologies make it faster and easier to self-serve in business interactions. They want quick responses, seamless experiences, personalization, and intuitive, user-friendly interfaces.

As a result, sales teams struggle to keep up with these demands and face significant hurdles to meet customer expectations, affecting efficiency, the quality of customer interactions, and the ability to capitalize on sales opportunities.

[Salesforce Sales Cloud](#) is the world's #1 AI customer relationship management (CRM) solution and the most complete sales platform. It empowers sellers to improve performance with data from any source, improve productivity with trusted AI, and fuel growth with intelligent operations and automation. This allows them to engage buyers more effectively, close deals faster, and grow revenue.

Want to enable sellers to get even more out of their information? That's where OpenText comes in. Learn how [OpenText's Extended ECM for Salesforce](#) incorporates the four best practices in this ebook to seamlessly enhance Sales Cloud environments. We'll explore real-world scenarios to show how you can bring essential documents together with customer data, so sellers have what they need to thrive.



## Common Challenges:

- Customer data scattered in documents across the organization
- Complex data security and compliance regulations
- Lack of clarity on how to best use AI to streamline processes
- Difficulty collaborating using disconnected systems
- Slow adoption of new technologies
- Manual tasks and reliance on outdated processes
- Obstacles in delivering a cohesive experience at every touchpoint



<sup>1</sup>[State of the Connected Customer](#), 6th Edition, Salesforce 2023

# Maximize Salesforce Efficiency with Document Integration and Automation

Imagine you're a seller who has just received an email from a customer, Monique. She's interested in your newest product offering but needs more information—and she would love a discount if permissible with her current contract. However, documentation and records are spread across departments. Your time is spent engaging with the product team for use case information, along with legal and finance to review pricing. Over the course of a day, these independently-managed documents and disconnected processes mean you spend valuable time on manual tasks—while Monique has already researched other solutions.

Give your sales team the information they need when they need it, right from Salesforce, by integrating systems and automating manual work with OpenText. This can eliminate administrative tasks like data entry and document management—ultimately empowering sellers to close more deals and build stronger customer relationships.



**28%**  
of a seller's week is spent actually selling, while the rest is made up of critical but tedious tasks.<sup>2</sup>



<sup>2</sup>State of Sales, 5th Edition, Salesforce 2023



## BEST PRACTICE #1

### Build an Integrated Information Infrastructure Within Salesforce

Get a comprehensive view of customer information, including related data and documents from ERP and other sources, immediately available in your Sales Cloud view. Here's how:

- Connect customer data managed within documents by integrating an effective document management platform
- Centralize customer interactions and information in Salesforce to improve collaboration between sales and service teams
- Create a Salesforce-centric ecosystem with deep integrations with critical business tools used daily by sales teams
- Optimize the user experience, making it more intuitive for sales teams to navigate

## BEST PRACTICE #2

### Automate Repetitive Tasks in Salesforce

Sales teams get a major efficiency boost from automating repetitive, manual document and data-related tasks such as data entry, report generation, and administrative work. Here's how:

- Automate document workflows and repetitive tasks like data entry and report generation within Salesforce to boost team productivity
- Adopt AI technologies to extract insights from content for enhanced customer engagement
- Employ tools within Salesforce that provide data-driven insights, aiding strategic decision-making and personalized customer approaches
- Scale with growing sales demand and managing all customer documents together securely in one place



## Enhance Information Reliability and Security

Now, you're working on a proposal for a long-time client, Jordan. You need access to his full transaction history, past communications, and contracts to prepare a tailored proposal. However, data is scattered across various departments and platforms. As you try to piece the puzzle together, you realize that some information is missing, and the latest contract amendments were saved to the wrong folder. This leads to questions about information accuracy and data security—which concerns Jordan and jeopardizes the deal.

Your sales representatives need a centralized source of information, and they shouldn't have to search for documents or manually enter data to create one. Reduce errors, misplaced data, and regulatory concerns with these best practices from OpenText and Salesforce.

<sup>2</sup>*State of Sales, 5th Edition, Salesforce 2023*



10

The number of tools sales teams use on average to close deals.<sup>2</sup>



### BEST PRACTICE #3

## Establish a Single Source of Truth in Salesforce

Maintain information integrity and accessibility with centralized customer data and documents together in one place. Here's how:

- Ensure all customer interactions, whether via email, phone, or chat, are captured and reflected in a unified profile
- Store all customer-related documents and communications in Salesforce, making it the go-to repository for anyone to access complete customer history
- Aggregate data from other customer-facing platforms
- Implement standard procedures for data entry and document updates within Salesforce to maintain consistency and reliability

### BEST PRACTICE #4

## Prioritize Security and Trust in Salesforce

Protect sensitive customer data and documents within a centralized environment to avoid legal and reputational consequences. Here's how:

- Use solutions that integrate smoothly with Salesforce security protocols and native tools
- Add layers of document management security and access controls to complement Salesforce's security protocols
- Leverage the compliance tools available within Salesforce and document management platforms to meet regulatory standards and requirements
- Manage documents in a central location for content audits to strengthen overall security and compliance

# OpenText and Salesforce: Next-level Sales Performance

Sales Cloud is already a powerful tool for managing customer relationships and driving sales. When combined with OpenText Extended ECM, you can enhance Salesforce to get the most of its capabilities. This integration seamlessly brings together powerful document management and CRM, along with other internal platforms, to automate tasks and centralize data while prioritizing security.



## Why Choose OpenText Extended ECM for Salesforce?

- ✓ **Complete view of the customer**  
Connect, share, and use customer-related documents across multiple applications and Salesforce clouds to distribute information across processes and surface it where needed.
- ✓ **Fully integrated information flows**  
Customer information stored in Salesforce can be surfaced within the document management platform to support business processes without screen flips.
- ✓ **All-encompassing document management**  
Easily generate, maintain, store, retain, and manage the entire lifecycle of contracts and all mission-critical documents in Salesforce.
- ✓ **Natural extension of Salesforce**  
OpenText Extended ECM for Salesforce integrates so smoothly that it disappears into the background, becoming a part of Salesforce.



## CUSTOMER STORY

# Hydroelectricity Producer Transforms Sales Operations and Customer Experiences

One of the largest hydroelectricity producers in the world needed a more efficient way to manage sensitive customer information within its Salesforce environment. Using OpenText Extended ECM for Salesforce, cross-functional teams now have all the information they need in a central location.

## Challenge

- Enable sales and customer service agents to access key customer related documentation and information to drive new opportunities
- Deliver business documents (invoices, reports, etc.) originating from various sources to a Communities portal for top customers, enhancing the customer experience
- Carefully manage extensive volumes of sensitive customer information

## Solution

- An integrated document management system within a Salesforce-based CRM solution
- Key invoice documents, reports, etc. generated in SAP are now available within Salesforce and Salesforce Communities
- Extended ECM for Salesforce governs sensitive customer confidential documents (throughout its lifecycle) in a central location, while making valuable customer specific information available to staff and customers





**opentext™**



# Get Started Today

OpenText's Extended ECM integrates Salesforce with an intelligent central document management platform that connects business applications to improve information access, flow, and governance across the business. Gain a competitive edge with an enhanced 360-degree view of all business information in one place:

- Instant customer data and document integration in one view
- Superior sales insights and secure document controls
- Seamless sharing and collaboration for better customer experiences
- Automation to reduce costly errors and manual tasks
- Connectivity across business applications

Visit OpenText on AppExchange





*The information provided in this e-book is strictly for the convenience of our customers and is for general informational purposes only. Publication by salesforce.com does not constitute an endorsement. Salesforce.com does not warrant the accuracy or completeness of any information, text, graphics, links, or other items contained within this e-book. Salesforce.com does not guarantee you will achieve any specific results if you follow any advice in the e-book. It may be advisable for you to consult with a professional such as a lawyer, accountant, architect, business advisor, or professional engineer to get specific advice that applies to your specific situation.*

© 2024 salesforce.com, inc. All rights reserved.