The IT Change Agent's Handbook:

4 steps to lead a
digital transformation

Introduction

Cloud technology has propelled IT from its traditional role of "keeping the lights on" to becoming an essential business driver. That means today's IT leader needs to play a more central role, serving as a business advisor, setting company's goals, defining strategic needs, and shaping the vision for the future.

To do all this, today's IT leader needs to steer the business towards a complete digital transformation. But it's not that simple: Many companies are in different stages of digital transformation due to controlled budgets, risk-aversion, or simply because they're overwhelmed grappling with emerging tech. It's tough to lead change when you're constantly managing and battling a growing and complex application portfolio.

But the digital age is here to stay, so you must push for this change or watch as your company gets bypassed by faster, smarter competitors. In this e-book, you'll learn how to digitally transform your business and how IT can build a future-proof foundation that will elevate the company's success.

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Accelerate Business: The Complete Platform

CRM has come a long ways since its earliest iterations. Today's modern CRM goes beyond a system that allows companies to manage their business relationships – and the data and information associated with those relationships. Its true value is within the platform a CRM is built on. When powered by a robust platform, CRM becomes the center for not only customer data, but also for connected data across other platforms and systems, your business processes and task automation, customization for the way you work, and for the apps that speed up every line of business.

IT makes sales effortless

In the end, business comes down to a very simple relationship: seller-to-customer. In the beginning, it might be fine to maintain spreadsheets to jot down notes about customers and incoming orders, but that won't fly for very long at the enterprise level. Here's where IT can step up and show business leaders that they aren't a cost center, but a true revenue driver: by helping the sales team be more effective. IT can give sales teams what it needs to be faster than competitors and react quickly to market demands. It means empowering sales to ditch their spreadsheets by connecting everyone at the company around the customer via CRM.
With IT's help to accelerate the business, sales can better:

Manage pipeline. Connected CRM helps sales teams gain better visibility of their pipeline and builds a structured process for routing leads to the right sales rep.

Collaborate. Communication can can be a big challenge for sales teams, but a complete platform fosters speedy collaboration across sales, service, marketing and partners to increase likelihood of deals closed by eliminating endless email loops and phone tag.

Increase time spent selling. Automating the repetitive tasks gives sales more time to concentrate on selling.

Connect everyone around the customer

There is more data about customers than ever before, from companies that collect it, customers that provide it, and technologies that predict it, and it's IT's job to connect it all together. When all of that data is stuck in siloed legacy solutions, it puts your sales and service teams at a disadvantage, and they aren't able to give customers the kind of personalized experience they expect. When data is connected in cloud-based platform, businesses can give all their employees a single source of truth. Everything from a customer's contact info, to orders, to every interaction is captured in one place, giving all employees a holistic view of customers at a glance. Armed with that information, your employees can deliver the kind of connected experiences that customers love.

"When I sit on CIO councils, all we talk about is how to maintain relevancy and lead our businesses along the technology journey. The answer is to find a platform such as Salesforce with an open architecture and robust ecosystem support."

Mike Anderson, CIO & SVP, Crossmark

Find out how IT leaders are leveraging data and technology to connect with customers.

CHECK IT OUT

Everyone deserves apps

Apps are what business demands. And apps are what help employees do their jobs and help customers connect with companies. We know that one of the biggest challenges for IT right now is keeping up with the huge demand for apps. Companies that partner strategically with the right platforms are able to meet this demand, and platforms that already connect the customer data have a head start on those that don't.

Ask yourself these questions when evaluating a technology partner:

- What is their reputation in the industry?

- Who is responsible for maintaining the infrastructure and technology?

- What tools and options exist for customizing and building on their platform?

- What productivity tools help more employees do more with less?

- What ecosystem and partnerships existing to extend the value of the partner?

- How can more employees both inside and outside of IT learn and engage with the platform?

An independent IDC study found that 12 Salesforce customers are achieving 478% 5-year ROI. [Download the full study here](#) to see more results.

Your Takeaways

- Make sales effortless by delivering the tools and platform that enable rather than get in the way.

- Connect your customer data and systems platforms that empower everyone with the data they need.

- Keep up with the demand for apps by partnering with, platforms already connected to customer data.

Forge Your Own Trail: Innovate With Technology

For many years, IT's function was to maintain infrastructure. As more IT and business leaders discover the cost and maintenance benefits of cloud computing, another benefit has emerged: IT leading the charge in company innovation. When you start with a robust and flexible cloud platform, it allow everyone from developers, admins, and business employees to speed business success.

"The way you get a seat at any table is showing your value in helping the company move forward."

**Toby Lester,** VP of Technology, Architecture & Innovation, Brown-Forman

Check out how IT helps Brown-Forman reach its goals.

CHECK IT OUT

Easily scale and integrate with a secure cloud

Legacy on-premise systems were built for a different era, and they tie up IT's time and resources. By nature, cloud computing is adaptive, agile, and designed for development and implementation that matches the speed of digital innovation. And today there's no shortage of amazing cloud-based products to help your business grow, get smarter, and go faster. When you have a single cloud ecosystem, with a common framework, developers and IT organizations can build, scale, and iterate fast using their preferred tools. Say goodbye to the days of long IT projects and cycles with next-generation Platform-as-a-Service (PaaS) architecture.
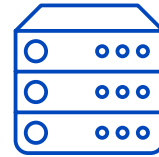
ON-PREMISE SYSTEMS   VS   **CLOUD**

CUSTOMER DATA:

| Siloed in each system | **Connected, 360-degree customer view** |

MOBILITY:

| Little or no mobile functionality | **Full mobile and social functionality** |

IT'S ROLE:

| In-house team maintains and updates | **Automatic updates deployed by provider** |

COSTS:

| Licensing fees and maintenance costs | **Flexible subscription plan** |

INTEGRATION:

| Manual and error-prone resulting in prolonged testing and downtime. | **Shorter implementation, customizable APIs available.** |

INNOVATION:

| Slower deployment and feedback loop. Not future-ready. | **Agile development. Faster releases, customer feedback and iteration.** |

All the tools you need out of the box

IT leaders need to find a cloud platform that serves both business and IT interests in order to keep customers happy. But where to start? Instead of cobbling together products and tools to fit your vision and strategy, it makes a lot of sense to look for solutions that are ready to go right out of the box. That way, your team can hit the ground running and even setup non-developers to help lighten IT's traditional workload.

What to look for in cloud products to jumpstart innovation:

- **Leading provider.** Look for a platform that's market-tested and delivers innovation often.

- **Trust.** Ensure that the cloud solution is built around a robust, flexible security architecture.

- **Customer success.** Find a solution that prioritizes customer success with training and community resources.

- **Multitenancy.** A fundamental technology that true cloud platforms use to share IT resources cost-efficiently and securely.

- **Ability to scale fast.** Check that the platform gives you the ability to customize, extend, and scale to your business needs.

- **Fast app dev.** Setup your IT department to add value through rapid innovation.

- **Open ecosystem.** Choose a provider that connects you with a community of experts and partners to extend the power of the platform.

"57% of consumers surveyed agree that it's very important for the companies they buy from to be innovative."

State of the Connected Customer, Salesforce Research

The smarter, faster business

The business landscape is getting smarter and faster all the time as new technologies emerge and become available for all companies to use. IT leaders need to assume the role of a trusted advisor to their business counterparts and guide them towards the solutions that can take the business to new heights. One of the easiest wins is steering lines of business towards making better, data-driven decisions using powerful analytics tools already built into the systems they're working in everyday. For instance, when sales reps are on the road, they can not only access and update their CRM, but also see into their pipeline, uncover new opportunities, and track team performance from their phones or smart watches using analytics apps. IT teams can even take it a step further by leveraging their company data to harness the power of the Internet of Things (IoT), predictive analytics, and AI to help everyone work smarter. When you increase internal access to systems and information, you also increase productivity and actionability since all your data becomes connected and predictive.

Your Takeaways

- Leverage cloud products to scale and speed project cycles.

- Look for products that are easy to setup, integrate and contains everything you need out of the box.

- Guide the business towards making data-driven decisions using tools that already includes technology like predictive analytics and artificial intelligence.

Create Customer Loyalty: Personalize Customer Experiences

Each part of the customer's journey involves technology. From awareness to the advocacy stage, today's customer expects to have personalized experiences from businesses. Beyond knowing their names, customers want you to connect with them one their preferred channels, know their history, and target them in highly-relevant ways. IT leaders can highly-impact their business's success by understanding that journey and optimizing the customer experience.

"IT should never be the one slowing down the company when it comes to delivering something to our customers. Never."

Antoine de Kerviler, CIO, Eurostar

Learn how apps are driving business transformation in the Age of the Customer.

CHECK IT OUT

Customized, but connected experiences

Customers certainly don't view themselves as "one-size-fits-all", so companies need to adapt to their need for personalization. That's where technology can do a lot of the heavy lifting. IT can help marketers reach customers where they are, on the right device, at the right time. Imagine if marketing teams could create messages and engagements across all your business channels from social media, emails, app notifications, to online paid campaigns tailored directly to the customer's interests, at the exact moment they need it. These hyper-relevant, targeted interactions all count towards building a relationship with customers and contributes to the overall quality of customer experiences.

Consistent experiences across entire customer lifecycle

Bruce Springsteen once said, "Sustaining an audience is hard. It demands a consistency of thought, of purpose, and of action over a long period of time." He was specifically referencing his long-standing music career, but the words still apply to the customer experience. While service teams might be on the frontlines of interacting with customers, true customer companies know that customer care extends across all departments and channels for the duration of the relationship. There is no such thing as a customer handoff anymore – all employees from marketing, to sales, to service need to provide quality experiences that reflect the overall brand. In turn, consistent positive experiences leads to higher levels of satisfaction and decreases the likelihood of churn.

"66% of consumers say they are likely to switch brands if they are treated like a number instead of an individual."

State of the Connected Customer, Salesforce Research

A mobile-first mindset via customer-facing communities and apps

By 2020 there will be 6.1 billion smartphones in circulation generating 80% of mobile data traffic. Millennial consumers, who have grown up with the rise of smartphones, are 2.3x more likely than baby boomers/ traditionalist consumers to consider not purchasing from a company if it didn't offer a mobile app. It's no trend; mobile is literally the future. IT leaders have a great opportunity to drive the company's mobile-first mindset by creating customer-facing communities and apps, that integrate into their lives more deeply than desktop apps. Here are a few high-value ways IT can transform customer journeys:

Communities: Make it easy for customers and partners to find answers, experts, and information.

Apps: Build engaging ecommerce, customer loyalty, and customer service apps to support customers wherever they go.

Marketing: Guide marketers in developing highly-targeted campaigns with multi-channel interactions and precise audience segmentation.

Internet of Things: Help lines of business engage with customers in real-time by using IoT to turn the data generated by every customer, partner, device, and sensor into meaningful action.

Your Takeaways

- Build stronger relationships with customers by using their data to personalize experiences.

- Give customers consistency in their interactions by connecting data across every department.

- Build high-value apps fast that integrate seamlessly into customers' mobile lifestyles.analytics and artificial intelligence.

Improve Employee Experiences: Empower Your Workforce

In addition to keeping pace with changing customer demands, companies must focus on hiring and retaining talented employees to drive it all forward. To aid in this important part of the business, IT leaders can create a single experience that empowers everyone. From faster hiring and onboarding, to increased employee efficiency, to empowering everyone to make smarter decisions, IT is in a significant position to make employees' lives much happier.

"[Our social intranet] gives online users a personality that email can't and encourages interactions from all geographies and areas of the business. We're really freeing the data and liberating the information."

David Baker, VP of IT, St. Joseph Health

Read about how mobile and social tools are improving healthcare.

CHECK IT OUT

A single mobile experience for employees

Just like customers, employees also desire a seamless, consistent working experience with easy to navigate UI to speed up their efficiency. When all your employees have a single, integrated, mobile experience for their apps, data, and platform, their productivity shifts into high gear. IT can empower employees from every department to collaborate quickly to solve service issues, pounce on opportunities, and react to events from anywhere, anytime. Let's look at a few ways mobile speeds sales productivity:

Increase sales. Mobile CRM ensures sales teams don't waste valuable time looking for contacts or looking for notes from previous conversations, and can work on closing deals.

Ultra responsive. Smartphones give sales reps a competitive edge due to the speed at which they're able to respond to customer needs.

Access crucial information. A mobile workforce is able to access all the important relevant information they may need for a meeting, right in the moment.

Better insights. Analytics apps give you real-time data that helps team members slice and dice data, no matter where they are.

Streamlined operations. Instead of working out of multiple systems, a mobile CRM platform provides the right tools to accomplish all of a sales rep's tasks in one place, making their lives a bit easier.

Enable Collaboration. Modern sales teams with multiple members can collaborate to get advice, information, and expertise on the fly.

And that's just scratching the surface. Now envision that for all employees in every department.

"84% of millennials and 76% of Gen Xers agree their mobile device is essential to the work they do."
State of the Connected Customer 2016

More access to information

Beyond giving employees a 360-degree view of customers, IT can empower employees to find answers to questions via self-service, access the files on-demand, and make smarter business decisions. For instance, having self-service analytics tools natively integrated in CRM gives sales and marketing insight into pipeline bottlenecks and whitespace. Having access to files, people and data means employees spend less time searching in emails and logging tickets, and more time doing higher-value work. When all of the data, files, and people are a few clicks away, employees can work more effectively, which in turn boosts retention.

Enable innovation across the entire company

Remember the days when every department came to IT for everything from new apps, fixes to existing systems, and pulling reports? What if business users could manage some of those tasks on their own? When you invest in a secure, flexible platform that spans your entire company, the opportunities to innovate are endless. Low code/no code technology enables every user from admins and business users, to experienced developers to build apps fast. IT's load gets lightened by extending and connecting business via APIs. When you enable development at every level of business, you lower infrastructure management costs and increase the speed of app development. Best of all, when you build on a trusted platform, you can add extra security when needed, decreasing risk.

Your Takeaways

○ Give employees a mobile experience that boosts productivity and collaboration

○ Empower employees to make smarter business decisions by giving them on-demand access to files and self-service options.

○ Speed development of apps by enabling developers, admins, and business users alike to build using clicks or code.

Time to think like a trailblazer

The speed and scale of change facing IT is matched by the speed and scale of the technology you must leverage to keep pace with competitors and customer expectations. In spite of working in an environment of constant change, IT leaders are working hard to drive business success. As a true business trailblazer, you have the opportunity to deliver digital transformation that empowers everyone across the business to innovate, elevates the employee experience, and connects with customers in new ways. How will you adapt to and transform this new digital landscape?
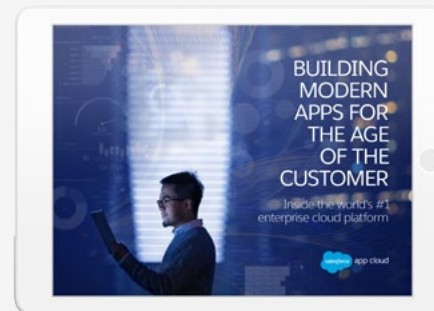
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IN A WHOLE NEW WAY**