



Customer Success Stories

Advisory Services: Transforming Business Through Strategic and Technical Guidance



Customer stories.

Companies turn to Salesforce Advisory Services to achieve a vision. Perhaps like Dell, they want to revolutionize sales productivity. Or like Barclays, they set out to create innovative customer experiences. Whatever their goal, they choose Advisory Services to gain the advantage of ongoing guidance, deep knowledge of best practices, and access to our ecosystem of Salesforce experts. With the help of Advisory Services, companies like these are transforming business.

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Get strategic and technical advice from Salesforce experts.

Let Advisory Services guide you on the path to success.

Deliver on your marketing, sales, service, and IT goals.

Transform your business with our proven, results-driven approach. Our Salesforce architects connect you directly to the newest Salesforce technology, best practices for deployment and implementation, and unparalleled product and vertical knowledge. Together, we'll help you streamline processes, increase ROI, and integrate legacy systems with new solutions.

Create the roadmap for your business goals.

When business and IT strategies work together, your business thrives. Our experts help you develop the strategic roadmap to align your IT infrastructure with your desired business outcomes. We'll show you the best governance practices, help you drive adoption, and make sure every part of your business operates as efficiently as possible.

Tap into deep industry and product expertise.

Our advisors are among the strongest in the Salesforce ecosystem, with decades of industry experience and Salesforce certification from our best-in-class training programs. We'll apply this deep knowledge to your business priorities, helping you achieve your goals, faster.

“Advisory Services is a vital contributor to the success of our endeavors. They are trusted advisors who elevate our relationship with Salesforce from being a supplier to a key partner.”

Christian Tchatchouang

Head of the SELL Domain Delivery, Vodafone

Barclays solves the tough problems with expert guidance.

Barclays, which traces its origins to 17th-century England and has operated as a distinguished banking institution since 1896, faced the challenge of creating innovative customer experiences while relying on legacy technology. Several years ago, the British company began to address that challenge with Salesforce, adopting Sales Cloud and integrating it with information in legacy systems.

The bank ran several instances of Sales Cloud and had about 27,500 licenses for Community Cloud. “Those Salesforce implementations grew naturally within each unit, without a unifying vision,” says Carl Carter, Vice President of CRM for Barclays UK. “We didn’t know how people were using it, or the other Salesforce toolsets available – and how we could exploit those different tools with different users across the bank.”

Carter set out to solve the challenge. First, he increased visibility and collaboration on the CRM strategy across the bank, with a focus on using more Salesforce products more broadly and uniformly across all groups. Next, his team started working with Salesforce Advisory Services to gain deeper product, platform, and integration expertise.

“We haven’t had the exposure to really understand how Salesforce could be done better within a large enterprise like ourselves,” Carter says. “That’s really where Advisory Services’ guidance comes in. They have experience from other large enterprises and help us apply those learnings to Barclays.”

Ian Stock, a certified Salesforce expert with Advisory Services, helped Carter’s team define an organizational strategy, and he advised teams on how Salesforce systems will integrate and behave. Stock helped Barclays adopt Lightning, the new Salesforce user experience and platform, across multiple business units. His experience with similar companies helped him anticipate potential problems with legacy systems integration.

When necessary, Stock reached out to other experts within Salesforce to solve tough problems. This has helped the Barclays team benefit from the entire ecosystem of Salesforce experts. “The experience that we’ve ultimately gained as a team from Advisory Services has been priceless,” says Carter.



Barclays is a British multinational banking and financial services company headquartered in London. It has retail, commercial and investment banking; wealth management; mortgage lending; and credit cards operations in over 50 countries and territories.

Barclays relies on the deep expertise of Advisory Services.

Challenge

- Different business units using multiple Salesforce instances
- Legacy systems that needed to evolve to serve customers' needs
- Need for CRM governance, vision and best practices

Solution

- Ongoing guidance on strategy and best practices for implementing and integrating Salesforce solutions
- Strategic planning for organization usage of Salesforce
- Access to the ecosystem of Salesforce experts

Results

- More efficient and effective delivery, maximizing the value of Salesforce implementations
- A wealth of new knowledge among Barclay's internal team
- Improved and consistent quality by introducing standards, best practices, and operational controls
- Reduced costs by increasing cross-team collaboration and designing a globally reusable component model

“The experience that we’ve ultimately gained as a team from Advisory Services has been priceless. Now we understand a lot more and know which resources we should be using day to day. It’s one thing learning from documents, but learning these things from an individual such as Ian, putting them into context, is invaluable.”

Carl Carter

Vice President of CRM, Barclays UK



Dell works toward a 360-degree view of the customer.

For nearly a decade, Dell has counted on Salesforce to enable its worldwide selling teams. Eventually, however, the Texas-based company started to see a disconnect between its platform and its salespeople.

"I remember walking into a meeting with a customer in Pittsburgh and asking our account executive for the account plan, and there was just silence," recalls Bobbi Dangerfield, Vice President for Global Sales Operations at Dell and a 16-year veteran at the company.

Employees were underutilizing the tools designed to help them gain a holistic view of their customers. The Salesforce platform they logged into had also grown complex over the years with custom code.

Dell wanted to revolutionize its sales productivity across the entire platform, which led to a five-year investment in Salesforce that included Advisory Services. A Salesforce business architect stepped in to help Dell executives make the modifications needed for Dell to gain the customer insights they yearned for while developing a roadmap marked with clear, prescriptive actions.

"Today, it's significantly easier for me to go to a customer, open up their account in Salesforce, and understand what I can do to help the conversation," says Dangerfield. "The number of team members using Salesforce in the selling process has doubled since implementing our advisor's recommendations."

Another way Dell saw Salesforce Advisory Services yield success was through a recommendation to implement Salesforce1. Its mobile-friendly tools empowered Dell's salespeople in the field by increasing their productivity while eliminating pain points.

Similar productivity gains were seen as Salesforce Advisors coached teams on how to best use Chatter to yield greater employee engagement and collaboration. "One-hundred percent of Dell employees are on Chatter, and Michael Dell himself uses the platform to regularly communicate with other executives and teams," said Steve Brown, Executive Director for Channel, Sales, and Marketing at Dell.

All of these improvements are major progressions in Dell's continuing mission to give its sellers the tools they need to succeed, and Salesforce is there to help Dell every step of the way.



For more than 30 years, Dell has played a critical role in transforming computing, enabling more affordable and more pervasive access to technology around the world. The company is relentlessly focused on delivering end-to-end technology solutions that work harder for its customers – from the 4-year old starting school to a data-center systems administrator to the CIO of a global corporation.

Dell works toward a 360-degree view of the customer.

Challenge

Dell needed a way to create a 360-degree view of its customer, while standardizing custom features and adding new functionality to its Salesforce platform.

Solution

Dell realizes faster agility and better productivity with the help of Advisory Services.

Results

- Increased sales mobile productivity through adoption of the Salesforce1 Mobile App, including a 300% increase in daily mobile logins
- Increased adoption of Chatter to help sales: A 32% increase in activity, 21% increase in contributors, 35% increase in file uploads
- Optimization through a 75% reduction in Salesforce instances across Dell
- Speed via 60% increase in sandbox refresh rate

“I see developing our Salesforce platform as a journey. It’s not finished yet, but we have made tremendous steps forward with the help of our trusted advisor.”

Steve Brown

Executive Director for Channel, Sales, and Marketing, Dell

Riverbed unifies teams around the world.

Riverbed works with companies to deliver the agility, visibility, and performance they need to make sure their cloud and digital transformation initiatives reach full potential.

And they're good at it: 97 companies of the Fortune 100 list are customers. As these companies undergo fast-paced, complex transformations, they rely on Riverbed sales, engineering, and support teams to provide the high-touch knowledge and responsiveness they need to succeed.

Riverbed's sales, engineering and support teams provide hands-on service to help customers navigate these complex technology changes with speed. The teams, in turn, count on Salesforce to provide knowledgeable and responsive service.

As Riverbed scaled, teams found that periodic end-user training sessions weren't keeping up with users' or customers' needs. Hoping to get more users to adopt Salesforce, and to develop unified processes for internal users around the globe, the Global Field Operations team engaged Advisory Services.

One main concern was that much-needed customer intelligence wasn't getting to users fast enough.

Time-consuming manual tasks were slowing down the Global Field Operations team's ability to make more strategic decisions.

"You can have great internal structures and frameworks set up, but if quality information isn't coming in at the right speed, everything downstream matters less," said Andrew Kodner, Vice President of Global Field Operations at Riverbed.

"We needed an ongoing partnership with Advisory Services so that we could keep growing with our customers."

Advisory Services added a program architect (PA) to Kodner's team. He brought deep technical expertise to the table, along with a clear understanding of where Riverbed was heading as a company.

The PA designed and helped implement a governance roadmap to simplify business processes and take advantage of new technology. This helped Kodner's team unify how Riverbed employees around the world used Salesforce, so sales, operations, and leadership teams could use the software in more powerful and effective ways.



riverbed®

Riverbed is a leader in application performance infrastructure. The company delivers complete platforms that enable application performance, data availability, and proactive detection of technology issues. The company's 28,000+ customers include 97 of the Fortune 100 and 98 of the Forbes Global 100.

Riverbed unifies teams around the world.

Challenges

- Lack of unification among different teams using Salesforce
- Time-consuming, manual tasks that prevented the operations team from focusing on strategic decisions about information management
- Slow transmittal of customer intelligence to the end users who needed it

Solution

- A program architect, with deep technical expertise and knowledge of Riverbed's business, who provided strategic ongoing guidance for better leveraging Salesforce capabilities
- Design of a governance roadmap to streamline processes

Results

- More strategic and powerful use of Salesforce for sales, operations, and leadership
- Faster flow of information to end users who need it
- Ability to scale quickly to keep up with the pace of Riverbed's business

“The partnership with Salesforce has been invaluable and strong. This level of engagement is exactly what we needed to successfully go through our own transformation.”

Andrew Kodner

Vice President of Global Field Operations, Riverbed

Vodafone synchronizes sales operations.

“When our CEO came to us one morning and asked for a complete view of our global opportunity pipeline, handing him that information was something easier said than done,” says Christian Tchatchouang, Head of Vodafone’s SELL Domain Delivery.

“At the time, we would consolidate information from different sales markets into a spreadsheet, but by the time it was submitted, the information would already be out of date and not very useful.”

Vodafone wanted to achieve this complete view of its global opportunity pipeline while ensuring that customers expanding their business had the same great sales experience working with Vodafone no matter where they went. However, accomplishing this is a challenge when you’re a worldwide telecommunications company with thousands of salespeople working across 24 different markets, all with different selling practices, Salesforce platform instances, and even different CRM solutions altogether.

“We needed something that could work with the scale of our company; a single tool that would enable all of our sales teams,” adds Tchatchouang. “There is no platform out there like Salesforce, and no partner or consultant service like Advisory Services that provides the skills and knowledge we needed for this kind of transformative endeavor.”

Vodafone used Advisory Services as a team of experts on the Salesforce platform to help guide implementation of the opportunity pipeline in each market. Since recommendations were in alignment with the Salesforce roadmap, it also meant Vodafone quickly adopted the new features and other benefits from Salesforce’s three releases per year.

“Reviewing all the features and services that Salesforce offers is like drinking through a fire hose. We wanted qualified experts with a deep reach

into the Salesforce organization who could help us make the right choices,” says Tchatchouang.

Advisory Services also helped Vodafone get the most out of its Salesforce platform through prescriptive recommendations like improving knowledge transfer with Chatter, collecting product feedback, and help with integrating third-party applications, such as CPQ, for consistent pricing and selling strategies.

Vodafone’s mission is not yet complete, but the global telco has since seen more than half of its markets align under a single global selling platform while increasing its global account coverage from 27% to more than 77%, contributing to an increase in sales win rates.



Vodafone Group Plc is one of the world’s leading telecommunications groups, with a significant presence in Europe, the Middle East, Africa, and Asia Pacific, with 461 million mobile customers and 13 million fixed broadband customers.

Vodafone synchronizes sales operations.

Challenges

- Differing sales and pricing strategies across markets
- No consistent selling experience for global customers
- Executives have no visibility of the global opportunity pipeline
- 24 markets all using different CRM solutions

Solution

Vodafone consolidated its sales teams onto a single Salesforce platform so they had a complete view of their opportunity pipeline while offering a more consistent customer experience from everyone on the team.

Results

- On track to align more than 24 sales markets into a single sales process and pipeline across 5,700 global users
- Improved collaboration between sales teams with Salesforce Chatter
- Grew customer loyalty via consistent selling experiences across markets and countries



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Christian Tchatchouang

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ETX Capital increases customer satisfaction.

ETX Capital leveraged Salesforce Advisory Services to create a single view of the customer and resolve inconsistent customer contact experiences. With the help of Advisory Services, the company designed a data model that brings external transactional information into Salesforce to provide greater context for customer contact.

This solution will allow ETX Capital to improve the quality of its customer service. “We wouldn’t have been able to think about the bigger picture with the resources we had, so it was good to have someone else to work with us to produce a roadmap that looks to the future,” says Peter Wallis, Chief Technology Officer at ETX Capital.



ETX Capital is a global financial spread betting firm that offers an online platform. The company’s platform allows customers to trade on a wide variety of commodities, stocks, and more, allowing tight spreads, low margins, and fast execution. A key focus for ETX is attracting and retaining customers, as well as service to customers once they become members.

Challenge

ETX Capital had multiple, disparate records existing for the same customer which led to decreased customer satisfaction, low retention rates, and missed upsell opportunities.

Solution

- Designed data model solution that remedied the multiple-record issue
- Created architectural diagrams, a roadmap for the future, and KPIs to measure the Salesforce roll out.
- Created proof of concepts to further to allow the customer to see what was possible

Results

- Clear Salesforce roadmap for the next 12 months to guide the team on what’s needed next
- Governance structure put in place to allow the team to follow a single project methodology
- Will allow ETX Capital to improve customer service

ETX Capital increases customer satisfaction

“The Salesforce Advisory program architect stepped into our business and quickly applied his skills and experience to produce current and future state architecture diagrams, and a valuable realistic business-outcome-focused roadmap that was spot-on.”

Peter Wallis
Chief Technology Officer, ETX Capital



Questions? We'll put you on the right path.

Advisory Services helps companies achieve their highest vision.
When you're ready to transform your business, contact your
account executive or call 1-800-667-6389.



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