



salesforce

INDUSTRY FULLFORCE SOLUTIONS

DEVELOPED BY PARTNERS
POWERED BY SALESFORCE

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INTRODUCTION

Welcome to the customer economy.

New technologies have given rise to a new way of doing business. Social media and mobile devices put more power in the hands of your customers, no matter what you're selling. Customers want to flex that power any time, anywhere, and on any device on-demand, and their expectations have changed.

Consumers expectations have changed. They want to drive their own level of engagement, and demand a consistent, unique experience every time.

Winning in this new marketplace requires more than brute force and deep pockets. It requires a customer focus fueled by agility and the ability to move quickly and easily to meet changing consumer demands and to leverage emerging technologies.

That means working in the cloud on a reliable and nimble platform of solutions that optimizes every customer touch point from a mobile app tap to an in-store purchase or social media complaint.

It means speaking the language of the customer. We see patients taking control of their health, clients expecting customized portfolio management from their advisors, and shoppers wanting personalized service based on their preferences. The companies that will win in this new market are those that rise to the call of this revolution and engage with their customers in entirely new ways.

Enter Fullforce, a suite of cloud-based solutions developed by industry experts at leading system integrators and based on the proven Salesforce customer-success platform. These solutions have the full power and support — the full force — of leading systems integrators and Salesforce, the world's most innovative company.



**Learn more about how
Industries at Salesforce
can help you transform
your business.**

We partner with leading consulting firms that use Salesforce technology to build innovative solutions tailored to industry specific business requirements. The products are designed to solve your precise pain points and decrease time to value — so you reap tangible business benefits fast.

The more than 40 solutions in the Fullforce portfolio are built on proven deployments with leading organizations across business types and industries. Fullforce empowers you to win in the customer economy with:

- **Industry leading Best Practices.** Because we partner with the top advisers in the world, you can be confident that you're getting the latest solutions that have been tested and tailored to your sector and business type.
- **Quicker & Easier Time to Deployment.** Fullforce solutions use the cloud to deliver business benefit without a significant infrastructure investment. Whether you take an incremental or transformational approach, Fullforce solutions accelerate deployment, support iteration, and reduce time to value.
- **Better Traction on KPIs.** Once deployed, Fullforce solutions give you the power to launch, manage, and repeat or retool activities that drive sales, service, marketing and community engagement.

Fullforce solutions give you this level of industry knowledge integrated with Salesforce's customer success platform.

We've pulled together an industry-by-industry look at some of the most powerful Fullforce solutions created by our strategic system integrators. Use this e-book to find a Fullforce solution to drive customer success and expand your business.

- Executives said social **(33%)**, mobile **(32%)** and cloud **(30%)** will be their top three priorities through 2016.
 - By 2017, **50%** of consumer-product investments will be redirected to customer-experience innovations.
 - **80%** of a company's future profits come from **20%** of its existing customers.
 - More than **\$41 billion** of revenue is lost each year because of poor customer experiences.
-



CHAPTER 1

COMMUNICATIONS



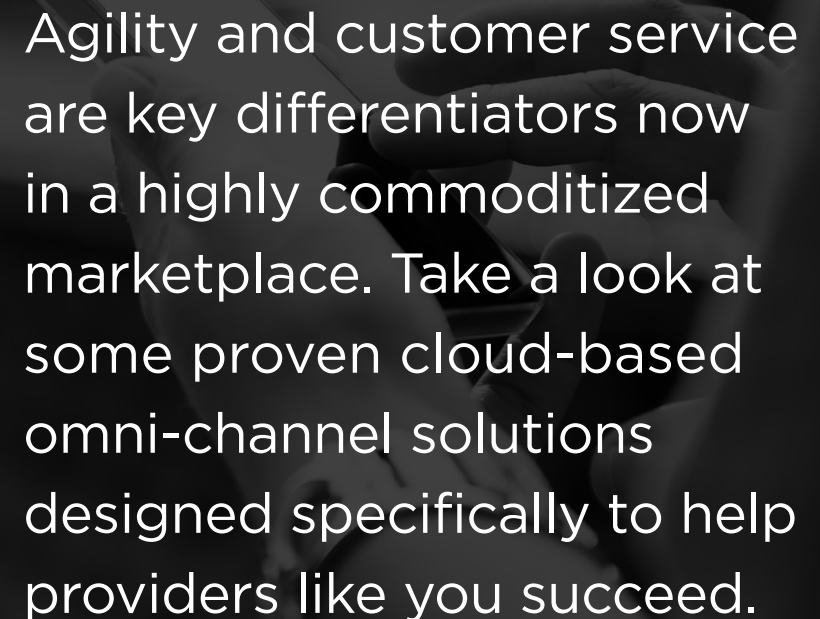
INDUSTRY OVERVIEW

CABLE. WIRELINE. WIRELESS. VOICE DATA.

The technology people use daily depends on the global infrastructure you build, manage, maintain and innovate.

Yet, as demands on the communications infrastructure evolve and increase, many in the industry struggle to address these important market trends:

- Continuing industry consolidation and market saturation create more competition for subscribers, which means pressure on pricing, margins and services.
- A generation of young people doesn't know what a "landline" is, and even baby boomers are cutting cable and telephone cords at an increasing rate.
- Customers want more than just uninterrupted service; they expect a better customer experience, personalized communications and higher bandwidth than ever before.



Agility and customer service are key differentiators now in a highly commoditized marketplace. Take a look at some proven cloud-based omni-channel solutions designed specifically to help providers like you succeed.

INDUSTRY OVERVIEW

CABLE. WIRELINE. WIRELESS. VOICE DATA.

Product and price are still relevant even in this changing landscape, but customer service and business agility are equally vital to corporate success. To move the needle on these metrics, providers must reinvent the way business is done and adopt technology that allows you to do it quickly.

- **Adopt an Omni-channel Approach.** Customers expect a seamless experience across channels. The most effective way to deliver this is through a single technology solution. Deploying this effectively on a single technology stack that serves all channels and is updated system-wide automatically helps avoid downtime issues.
- **Improve Customer Experience.** Customers in all industries require higher levels of transparency and access. They want providers to know them as individuals, adapt to their needs and serve them as a team instead of through individual lines of business. New market entrants such as Apple, Amazon, Netflix and Google have set the bar high. An omni-channel solution improves experience and satisfaction by giving some power back to customers. The additional transparency and access build trust, which, in turn, drives loyalty.

- **Measure Customer Satisfaction.** Customer satisfaction is more than a call center metric. You need more robust and detailed data to identify trends and trouble spots, respond swiftly and produce new products and services. This includes monitoring social media and online communities to see what people are really saying. Insight into buying patterns across channels, call center performance, leads across channels, and product-selling performance are all indicators of customer satisfaction.
- **Use Cloud-Based Solutions.** Agility and simplicity are the two most important aspects needed in the technology stack to power to meet the ever-changing requirements of applications that power the business. The days of siloed, on-premises systems are past. A cloud-based solution is the best way to power to fuel an omni-channel approach. In the cloud, you use multiproduct integration models that are easier and faster to implement and more cost-effective to maintain. You can upgrade the entire system quickly, accelerating your ability to rapidly develop the innovative, high-value products customers demand.

[Learn more](#)

Solution Overview

ACCENTURE SAAS REFERENCE ARCHITECTURE FOR COMMUNICATIONS SERVICE PROVIDERS



Accenture and Salesforce partnered to create a “Business Support System (BSS)” framework that allows you to accelerate your business with a solution that combines Accenture’s deep communications industry experience with Salesforce’s Fullforce platform. Based on the Business Process Framework (eTOM) framework, the solution is supported by a strong telco data model; enabled by pre-integrated, best-of-breed ISV partners; and driven by change-enablement methods. The solution is deployed at a telecommunications organization in Australia and is in various phases of implementation across the globe.

THE SOLUTION:

- Is a carrier-grade, multitenant cloud-based BSS platform designed specifically for CSPs
- Provides an agile, modular, next-generation cloud-based solution
- Combines best-of-breed components

SaaS solutions are no longer the new, risky alternative to an on-premises technology stack. They are fully viable options whether or not you’re buying new software or upgrading or replacing a homegrown or on-premises application.

BENEFITS

The Cloud BSS Framework creates client value across time, scope and cost:

- **Time.** The solution improves business agility through rapid innovation and implementation, faster speed to market and ongoing and immediate upgrades.
- **Scope.** Experience improvements across the organization through standardized processes for lead management, sales operations and digital marketing; more efficient CPQ and ordering/billing capabilities; and increased collaboration and social engagement.
- **Cost.** Get better technology with no additional infrastructure investment and a low capex. You can issue licenses based on utilization data and achieve better business outcomes with minimal IT support.

Accenture helped a client launch the solution in just 12 weeks. The aggressive timeline was met in part by using the Accenture SaaS Reference Architecture for Communications Service Providers and Accenture SaaS Quick Start Toolkit.

[Learn more](#)

Telecommunication companies gain a competitive edge with a centralized product catalog to manage and quickly launch new products and services. Telco Sales-360 provides a complete telco-specific sales model that supports a simple way to quote products with different solution and service requirements for flexible pricing scenarios. While few have developed the end-to-end solutions required to deploy these functions, Tech Mahindra Telco Sales-360 provides a pre-configured solution based on a communications-specific TAM process model that can be easily deployed organization-wide.

THE SOLUTION:

- Is designed to meet the specific sales needs of telecommunications companies
- Brings together Tech Mahindra's extensive telco experience and Salesforce's demonstrated technology
- Is built on the Salesforce Customer Success Platform with a highly configurable approach

Use Telco Sales-360 to manage your sales process and product complexities with minimum churn and effort.

BENEFITS

The Tech Mahindra Telco Sales-360 suite is a complete solution that improves performance and yields results through:

- **Customer Experience.** Enable customers and sales staff to access data anywhere and from any device or channel. Communities allow customers, partners and employees to communicate and collaborate more effectively. Telco Sales-360 even supports inventory and availability checks for more accurate selling and ordering.
- **Velocity & Accuracy.** The flexible product catalog yields faster time-to-market. Automated forms and streamlined processes mean quicker quote and lower lead-to-order-capture times. Built-in validations reduce errors.
- **Low TCO.** The solution integrates seamlessly with existing tech infrastructure and Salesforce, reducing time to deployment. The components can be scaled to meet business needs, and the subscription model eases budget creation and automatically updates every quarter.

[Learn more](#)

CONSUMER GOODS

INDUSTRY OVERVIEW

CONSUMER GOODS

Today's consumers depend on new technologies, devices and services. Yet Consumer Goods (CG) companies often struggle to adapt their operations to these digital innovations.

These trends are shaping the CG marketplace:

- Innovations in cloud and mobile technologies allow you to gather reams of data, automate and streamline business processes, and connect back-office processes for more effective customer service and field performance.
- Digital communication tools convey information, deliver marketing and support collaboration more effectively and quickly than ever.
- Customers want a rapid response to everything from service requests to promotional information, putting additional pressure on traditional supply chains and CRM solutions to meet new expectations.

INDUSTRY OVERVIEW

CONSUMER GOODS

Whether you're selling adult beverages, paper towels or snack crackers, meeting these trends head-on is critical to success.

- **Extend Marketing Reach.** Give your reps the power to reach more prospects, buyers and influencers with relevant messaging and offers via digital marketing tools, such as personalized e-mail and Web portals, targeted promotions and discounts.
- **Support Collaboration & Communication.** Social collaboration gives field reps the power to convey more targeted information faster and to more people than ever, and social-inspired tools make communicating with teams, departments, suppliers, wholesalers, retailers and consumers more effective than in the past.
- **Improve CRM.** Mobile and cloud technologies let sales reps identify service issues on-site and in real time, and empower call center agents to manage customers' orders, issues and requests more rapidly, resulting in better service and increased loyalty.
- **Increase Visibility With Better Data.** Better decisions are made when everyone has access to metrics and other data via dashboards and pre-built reports providing insight into supply chain issues, order trends, cost management and sales productivity.

Improve your company's ability to take on these trends with proven cloud-based solutions designed specifically for CPG companies like yours.

The Deloitte Digital Hub is a B2B customer and partner community designed to increase customer engagement, build loyalty and drive sales on any desktop, tablet or mobile device.

THE SOLUTION:

Hub provides a dynamic, configurable approach to increasing sales and improving trade marketing and field sales efficiency.

- Combines Deloitte Digital's extensive knowledge of the consumer goods industry with Salesforce's demonstrated technologies
- Focuses directly on the key pain points CG companies experience
- Brings the power of mobile, cloud and social technology to your business

Deloitte Digital Hub provides a dynamic approach to increasing sales and improving marketing efficiency and effectiveness.

BENEFITS

Hub is designed to be tailored to your business quickly, speeding up development and deployment, and reducing the risk with a tested, award-winning solution:

- **Increase Customer Communication & Loyalty.** Create a direct channel to customers with tailored brand and product news, relevant promotions and on-point recommendations informed by purchase history. Build loyalty with text, email, live chat or phone outreach based on customer preferences, and by utilizing built-in rewards features.
- **Reduce Cost to Serve.** Service more customers more profitably by providing a scalable, personalized community so customers can engage with you when they want, how they want. Hub both complements field sales activity, by providing rich customer information and engagement options, and can substitute it to reduce the cost to serve.
- **Increased Sales.** With its personalized content, engagement and loyalty capabilities, Hub can drive sales of the right product to the right customer and let the customer come to you.

[Learn more](#)

PocketSales gives your reps the power to improve customer experience, which leads to more sales, customer loyalty and satisfaction: By combining field visit insights with rich customer and outlet data, Pocketsales helps sales, service and trade marketing teams to better understand their customers, plan and dynamically optimize visits based on maximum customer potential, and seamlessly execute retail call activities.

THE SOLUTION:

- Is designed specifically for sales, service, trade marketing and key Account Managers
- Utilizes a tested, cloud-based, mobile-enabled technology enabling on- and offline working
- Combines best-in-class solutions for customer engagement, trade marketing and brand advocacy

BENEFITS

Pocketsales has been successfully deployed in more than 20 geographies across APAC, Americas and EMEA by four leading global consumer goods businesses. There is a tested support model for customers and a roadmap of innovations planned to further enhance the vision of creating a truly connected customer ecosystem.

- **Improve Sales.** Harnessing predictive analytics, sales teams can improve product availability and product distribution by visiting the right customers at the right point in their decision making with the right product messages.
- **Increase Customer Advocacy.** Utilizing image recognition, tailored surveys, gamified digital presentations, and advanced loyalty mechanics, sales and service teams are able to enhance customer interaction, improve brand perception and promote brand advocacy.
- **Reduce Cost to Serve.** Intelligent visit planning, route optimization and offline visit execution with automatic synchronization helps the sales and services teams to better understand their territory, optimize field visits and reduce overall cost to serve.

Deloitte Digital Pocketsales, built on the Salesforce1 platform, is a mobile-first suite of apps specifically designed for field sales and service teams in the consumer goods industry.

[Learn more](#)



CHAPTER 3

ENERGY



INDUSTRY OVERVIEW

ENERGY

Technology-driven disruption is transforming the energy industry.

The rules of the energy business and customer engagement have changed and companies need to embrace the new technology necessary to reimagine engagement and go beyond product. This includes critical tactics to address trends such as:

- Revenue is limited by wildly fluctuating crude prices and commoditization, hampering companies' abilities to differentiate and successfully compete against multiple players.
- The effect of missed production is more harmful than ever. Companies experience a 7% lower market cap when forecasts aren't met.
- Traditional industry siloes make it impossible to efficiently collaborate across stakeholder groups on contractual requirements, regulatory reporting and royalty ownership.

75% of manufacturers are investing in customer-facing technologies, looking to layer a system of engagement on top of their systems of record.

INDUSTRY OVERVIEW

ENERGY

Energy companies are heavily invested in systems of record, which digitize internal operations but not customer and stakeholder engagement. To move the needle, energy companies must add a mobile- and social-enabled system of engagement on top of the existing stack to leverage the power of data science and the cloud.

- **Optimize Plant & Field Service Operations.** Put the Internet of Things directly in your hands with streamlined data collection and communication. Connect and contextualize data from equipment, including specifications, work history, performance and location data at scale to understand every event and interaction in real-time. This enables rapid and accurate performance predictions for production assets and direct resources. Ensure fast resolution everywhere with personalized work programs based on skills and journey management delivered to the mobile device with geo-fenced context, and through access to key asset information, a contextual knowledge base and global collaboration.
- **Collaborate with Stakeholders.** Improved communications enables more efficient and frequent sharing with joint venture partners and regulatory agencies. Meet increasing community demand for outreach and information, which improves relationships and builds trust.

- **Leverage Mobile, Social and Cloud Technologies.** Connect field operations to valuable data and insights so field operators can quickly respond to and resolve performance issues. Realize time and fuel efficiencies with mobile-enabled dynamic route assignment, predictive work packages, geo-fenced field data capture and adaptive safety tools.
- **Monetize Products & Services.** Improve profitability with a new approach to monetization. Enhanced inquire-to-order functionality allows personalization and accelerated field sales processes. Reps can sell in new ways by engaging customers with B2B marketing activities and by using more efficient quoting and contracting processes.

This is the roadmap for digital transformation within the energy industry.

[Learn more](#)

Solution Overview

ACCENTURE CUSTOMER EXPERIENCE SOLUTION FOR UTILITIES



Accenture Customer Experience Solution for Utilities drives real innovation and value for utility retailers. Its full scope of processes from marketing through service to utilities enables new value proposition and growth opportunities to utilities offering commodity and non-commodity products.

THE SOLUTION:

- Is designed to address the specific needs of utilities
- Combines the strengths of the complete Salesforce Customer Success Platform with Accenture's global knowledge and experience in the utilities market
- Supports collaboration and operational efficiency through cloud-based, mobile-and social-enabled functionality

The Accenture Customer Experience Solution for Utilities helps utility retailers increase speed to market and customer satisfaction, reduce operational costs and unlock new revenue streams.

BENEFITS

Deploy Accenture Customer Experience Solution for Utilities to drive:

- **Efficiency.** Preconfigured end-to-end scenarios are specifically created for utility retailers and support standard back-end integrations with the leading utilities billing applications. Available on a modular basis, the solution easily matches your organization's business needs today and in the future.
- **Visibility.** A fully digital omni-channel approach with customer self-service scenarios increases customer insight and front- and back-office involvement. Utilities realize improved operational and cost efficiency through reduced service calls.
- **Innovative Business Processes.** The solution empowers you to operate, maintain and enhance business processes for the highest flexibility at a low and predictable cost. Create new campaigns, products and services independently of IT to accelerate time to market.

“The Accenture Customer Experience Solution for Utilities allows utilities to become digital retailers and realize increased agility, increased customer satisfaction and lowered operational costs.”

[Learn more](#)

Solution Overview

ACCENTURE OPPORTUNITY TO CASH SOLUTION (AOCS)



AOCS is a digital platform supporting the opportunity-to-cash process for Oilfield Equipment and Services (OFES) companies. It replaces multiple fragmented systems and spreadsheets, and supports real-time collaboration among and between sales, operations and customers – anywhere, at any time.

THE SOLUTION:

- Is industry-tailored to support OFES practices in opportunity management, quote configuration and pricing, contract lifecycle management, and job planning and execution
- Leverages Accenture's industry knowledge with Salesforce's proven platform
- Enables collaboration and efficiency with cloud-based pre-built and pre-tested configurations and mobile-ready apps

AOCS makes it easy to compare planned versus actual job plans and deal economics.

BENEFITS

Achieve gains across your enterprise with:

- **Improved Sales & Service.** Connect product catalogs, price lists, cost data and business rules related to upsell/cross-sell to facilitate faster creation of better quotes. Capture job information at the site so reps can send the original pricing with the job execution details to billing. Collaborate with customers on quotes and contracts, inquiries and disputes, and jobs via the Customer Portal. Increase win rates, deal velocity and deal size with guided selling.
- **Streamlined Workflows.** The solution is tailored to the industry to support OFES practices in opportunity management, quote configuration and pricing, contract lifecycle management, and job planning and execution. This allows for easy comparison of planned vs. actual job plans and deal economics.
- **Increased Communication & Collaboration.** The new Customer Portal channel allow sOFES providers to collaborate with customers on quotes and contracts, inquiries and disputes, and jobs.

[Learn more](#)

Solution Overview

ACCENTURE DIGITAL OTC PLATFORM (ADOP) FOR OILFIELD EQUIPMENT & SERVICES



ADOP is a digital platform supporting the Opportunity-to-Contract process for Oilfield Equipment and Services (OFES) companies. It replaces multiple fragmented systems and spreadsheets, and supports real-time collaboration among and between sales, operations and customers – anywhere, at any time.

THE SOLUTION:

- Is industry-tailored to support OFES practices in opportunity management, quote configuration and pricing, contract lifecycle management, and job planning and execution
- Leverages Accenture's industry knowledge with Salesforce's proven platform
- Enables collaboration and efficiency with cloud-based pre-built and pre-tested configurations and mobile-ready apps

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- **Streamlined Workflows.** Digitize data to eliminate duplicate data entry, integrate data from multiple sources, automate deal economic calculations and facilitate handover to operations or billing.
- **Increased Communication & Collaboration.** Empower well and rig masters to assist with market share reporting and historical data analysis on the products and services they sell. Use the opportunity pipeline to inform operational planning and help ensure resource availability for job execution.

[Learn more](#)



CHAPTER 4

FINANCIAL SERVICES

INDUSTRY OVERVIEW

FINANCIAL SERVICES

The impact of the financial crisis forever changed the way financial services companies operate. The industry has turned its focus away from derivatives and back to traditional financial products, the diverse needs of its clientele, and to rebuilding trust among these important customers.

This new market reality fuels several important industry trends:

- Your clients expect more. They don't care about your bank's legacy systems or business silos. They want an effortless experience when and where they chose to engage.
- Your employees are struggling to meet the demands of clients as they are forced to toggle in and out of siloed, disconnected systems and processes.
- FinTech disruptors are using innovative technology to provide more personalized, effortless experiences, raising the bar across the industry.

Salesforce helps us be
a relationship bank.

- Steve Ellis, EVP, Wells Fargo

INDUSTRY OVERVIEW

FINANCIAL SERVICES

Successful firms embrace these changes and look for ways to accelerate their transitions to becoming more customer-focused institutions.

- **Break Down Internal Silos.** Repeated mergers and acquisitions created heavily siloed operations and information systems. The situation makes it difficult to deploy solutions across the organization, slowing innovation and further entrenching existing problems. A single platform breaks down those barriers and spans the organization. This is the key to taking advantage of technology gains, improving service and staying competitive.
- **Understand Customers More Deeply.** Financial institutions are accustomed to thinking about customers in terms of dollar amounts. But today's retail bank customers have portfolios of diverse needs — and understanding them creates opportunities to offer clients more products from various lines of business. But you can't do that without a full view of customers' current accounts and a way to gather and use important information about needs, preferences and aspirations.

- **Invest in Customer Engagement.** It may seem impossible to replicate the experience of working directly with a friendly teller or manager at a local branch, but technological innovations permit you to extend that feeling to the Web or a mobile device. This includes providing CRM via social media. Engaging customers regardless of where they are and what time it is ensures loyalty and builds brand equity.
- **Use the Power of the Cloud.** The thought of a rip-and-replace technology upgrade is daunting. But cloud-based platforms allow for a customer-engagement layer that fuels customer satisfaction and increases trust.

With the pendulum swinging toward better customer experience, take a look at these solutions designed especially to address these trends head-on.

[Learn more](#)

Effective and high-quality customer service is no longer a “nice to have.” eContact Center enables you to design more meaningful service touchpoint interactions that affect the bottom line.

THE SOLUTION:

- Is designed expressly to meet the complex needs of the insurance industry
- Balances Accenture’s insurance industry knowledge with Salesforce’s technology
- Promotes collaboration and efficiency with a cloud-based, mobile — and social-enabled product line

The eContact Center replaces the traditional call center with a digital one focused on customers, their agents and beneficiaries.

BENEFITS

Increase customer care with eContact Center through:

- **Enhanced Customer Service.** Achieve customer centricity with easy data harvesting, efficient responses and personalized experiences. A 360-degree view of the customer empowers agents to provide more information and reduces repeat calls and customer dissatisfaction. Self-service portals enable instant online or mobile access to data.
- **Cost-Effectiveness & Agility.** Based in the cloud, eContact Center is regularly and automatically updated. The Agile methodology ensures that features and capabilities are rapidly iterated and integrated, enabling you to keep up with changing technologies, scale and needs.
- **Enhanced Efficiency.** Improve agents’ productivity with predictive modeling, sensitivity tractions, integrated holistic desktops, knowledge management and dynamic collaboration. The solution also eliminates manual processes and lookups, and encourages collaboration between sales, underwriting, claims and other departments.

eContact Center was created by Cloud Sherpas, which is now part of Accenture.

Insurers using a service agent dashboard with a 360-degree view of the client experienced 31% increase in customer retention and a 34% increase in first-call resolution.

[Learn more](#)

Solution Overview

ACCENTURE INSURANCE AGENT EFFECTIVENESS SOLUTION



The Accenture Insurance Agent Effectiveness Solution creates an ongoing cycle of improvement with increased visibility and access to data.

THE SOLUTION:

- Is tailored to the special needs of carriers and agents
- Combines our industry experience with the award-winning Salesforce platform
- Enables you to easily and cost-effectively address industry challenges

The Accenture Insurance Agent Effectiveness Solution empowers you to improve your entire team's effectiveness and efficiency through execution consistency and territory planning.

BENEFITS

The Accenture Insurance Agent Effectiveness Solution improves functionality and enhances account planning and relationship management.

- **Functionality.** Enhance business agility and flexibility with automated and standard processes for planning, recruiting, onboarding, training and development, sales execution, and ongoing performance management. Create an agent/agency profile to understand the strengths and weaknesses of your agency and to establish a basis for tracking ongoing sales progress.
- **Account Planning & Relationship Management.** The solution improves performance and depth of producer relationships. Encourage loyalty through better service with top-down, bottom-up sales-planning tools and growth-planning calculators. Develop and capture overall sales goals and targets by product lines, and generate a regular schedule for visits that develops relationships and drives results. The solution also increases speed-to-performance for new agents and brokers, and makes it easier to recruit and appoint high-performing agencies, agents and brokers.
- **Time & Cost.** The Accenture Insurance Agent Effectiveness Solution requires less time and cost to deploy. It's easy to scale and is quickly updated, so you experience rapid business outcomes with relatively low IT support and spend.

[Learn more](#)

Solution Overview

INVESTMENT MANAGEMENT PLAYBOOK FROM ACCENTURE



Investment Management Playbook is a true vertical solution that sets a foundation for a business benefit-driven approach to cloud technology — reducing time to deployment with industry best practices and a proven methodology.

THE SOLUTION:

- Is built especially for investment management firms
- Combines Accenture's experience in financial services and investment management with Salesforce's industry leading cloud technologies
- Enables mobile, social and digital capabilities without substantial IT infrastructure investment

We take a comprehensive approach to assessment through design, integration, deployment and ongoing support.

BENEFITS

Investment Management Playbook addresses operational, technological and customer service challenges, so you gain and maintain a competitive advantage through:

- **Operational Efficiencies.** Automate and streamline core retail and institutional investment-management functions, including sales roll-up reporting, call reporting, event tracking, expense tracking by client, campaign management and literature fulfillment. Some elements are populated with pre-configurations and value-add technical components.
- **Technology Advantage.** Investment management frameworks accelerate Salesforce implementation and deployment and Accenture's advisory services, which provide for strategic direction, change management, integration and user adoption. Mobile functionality and social collaboration workflow scale across the organization without requiring a major investment in new infrastructure.
- **Customer Service.** Power more robust client profiling and investor preferences, integrating digital and CRM strategies to elevate brands. It includes a mobile solution for your field sales team, and a central data hub equips your marketing team to target adviser and broker-dealer business more efficiently. It also promotes targeted social solutions to help intermediaries add more value for potential and existing clients.

Investment Management Playbook was created by Cloud Sherpas, which is now part of Accenture.

[Learn more](#)

Your business depends on an effective producer channel. But limited access and information-sharing between you and your agents impair your ability to understand the sales pipeline and data. Producer Direct addresses these challenges directly.

THE SOLUTION:

- Is designed specifically to help insurers get more from the producer channel
- Combines Salesforce's robust technology platform with Cloud Sherpas' broad industry experience
- Provides benefits from marketing automation, and cloud-based, mobile — and social-enabled technology

Producer Direct is based on best practices and populated with pre-configurations and valuable technical components, such as agent/producer retail management and marketing automation.

BENEFITS

Producer Direct empowers your producer sales organization to sell more through:

- **Productivity.** Provide agents with vital tools such as needs analysis/calculators, a tool to identify upsell opportunities, and a hub to access product and customer data from any location on any device. Social capabilities make it easy to find leads and enable social selling.
- **Effectiveness.** Support producers with smart lists focused on key deal-closing activities or showing leads with rankings, notes and first-touchpoint details. Chatter and communities encourage real-time collaboration and appointment tracking.
- **Recruitment & Onboarding.** Make the process of finding and preparing agents more efficient with access to a trusted network for agent referrals. Personalize agent access to your intellectual capital so they have the information they need to succeed.

Producer Direct was created by Cloud Sherpas, which is now part of Accenture.

42% of insurers say difficulty sharing customer data and analytics keeps them from realizing optimal agent productivity.

[Learn more](#)

Solution Overview

CAPGEMINI INSURANCE

ALL CHANNEL EXPERIENCE



Capgemini Insurance All Channel Experience (ACE) increases revenue and retention, enabling you to engage customers cost-effectively at every interaction along the quote and buy, service, and claims journeys. Offering a more intimate level of customer service establishes a future-proof competitive edge for your firm.

THE SOLUTION:

- Is designed specifically for the insurance industry
- Combines Capgemini's extensive industry know-how with Salesforce's award-winning technology
- Enables digital transformation with cloud-based and mobile- and social-enabled solutions

Insurance ACE strengthens every customer communication channel to create more value through superior service.

BENEFITS

With Capgemini's Insurance ACE, customer-experience effectiveness is increased, agent productivity grows and your IT capabilities are more robust.

- **Richer Relationships.** Offer customers a more responsive and personalized experience, differentiating your agency and increasing business. And you ensure that a customer has the same experience across multiple channels and on any device.
- **Agent Productivity.** Cloud access to real-time product knowledge and integrated telephony make agents more efficient. Insurance ACE's unified view of the customer enables agents to review interactions and transactions more quickly so they can up-sell, cross-sell and write more business. And the experience is enhanced, so leakage is reduced.
- **Digital Transformation.** Integrates the Salesforce1 platform with insurance binding and underwriting systems such as Guidewire and e-signature providers such as DocuSign. Implementation is unique to your needs, and deployment is fast, reducing time to value dramatically.

Globally, positive customer experiences decreased significantly in 2014, indicating that steps taken by insurers are not matching rising customer expectations.

[Learn more](#)

Deloitte's Connected BANK provides accelerators to engage, advise, onboard, and service clients across all lines of business. Built on Salesforce's technology, Deloitte's Connected BANK can increase revenue and retention, and improves efficiency throughout the enterprise.

THE SOLUTION:

- Combines Deloitte Digital's extensive knowledge of the financial industry with Salesforce's demonstrated technologies
- Focuses directly on the key pain points financial companies experience
- Includes pre-built features for banking, wealth insurance and asset management processes

Connected BANK improves operations, refocuses channels and meets customers' needs without having to rip and replace the existing technology infrastructure.

BENEFITS

Connected BANK can help you improve productivity improve productivity and collaboration, provide better service, and integrate and customize solutions to drive:

- **Productivity & Collaboration.** Track goals, map relationships, and address compliance and regulatory requirements with pre-built features that make data actionable with dashboards and reports. You can even integrate with social media to automatically capture leads and create cases.
- **Service.** Be more responsive to customer needs with mobile devices that untether specialists and managers from their desks so they can work with clients more closely.
- **Integration & Customization.** The solution is easy, customize and deploy. It's designed to implement with core banking systems using a simplified programming model in a cloud-based, run-time environment. It can be built and run up to five times faster and at about half the cost of traditional software platforms.

[Learn more](#)

Solution Overview

DELOITTE DIGITAL FASTCONNECT



Today's insurance customers expect more from providers, including personalized and direct communication, and a higher level of customer service. *FastConnect* positions you to address these challenges.

THE SOLUTION:

- Is pre-configured, integrating mobile, cloud, social and analytics technologies
- Blends years of Deloitte Digital insurance industry experience with the Salesforce Customer Success Platform
- Streamlines the processes you use the most to provide personalized, faster customer service

With *FastConnect*, you can improve revenue and indemnity spend, upgrade underwriting performance and operational efficiency, and provide superior customer service.

BENEFITS

Deloitte Digital *FastConnect* provides faster time-to-value through:

- **Integration.** Gather customer data, create quotes and secure underwriting approval more quickly with auto-fill quote sheets and forms. This decreases the time required to complete tasks related to new business development, application submission, underwriting and policy issuing. Collaboration tools and communities allow you to work more effectively with partners and employees.
- **Omni-Channel Experience.** Drive customer satisfaction with mobile- and social-enabled access to self-service portals and apps. Loyalty management, combined with social media monitoring, increases the effectiveness of marketing and promotions. The online assistance and search tools help you be more responsive.
- **Distribution.** The end-to-end sales process leverages automation to improve lead, opportunity and contract management; it also increases productivity with 360-degree dashboards and geoplanning tools and reports.

Customers using *FastConnect* saved **200 man-days in the implementation effort and 120 man-days in distribution.**

[Learn more](#)

The AdvisorFocus solution provides faster and more predictable deployments so you can manage your client relationships and improve advisor productivity.

THE SOLUTION:

- Is created to address the unique requirements of wealth advisors
- Leverages LiquidHub's deep vertical expertise to provide more personalized customer experiences using the proven Salesforce platform
- Captures the power and convenience of the cloud and mobile - and social-enabled technology

BENEFITS

Advisor Focus enables you to rapidly deliver tools to manage client relationships and improve advisor productivity through:

- **Integration Support.** The solution makes it easy to integrate the most commonly used third-party systems in the industry, such as portfolio management, financial planning, DMS, and Microsoft Outlook. Pre-built conversion packages support integrations from Redtail, Junxure, Dynamics, Siebel, etc. onto the Financial Services Cloud.
- **Accelerated Discovery and Build Cycles.** The AdvisorFocus Solution accelerates and optimizes the implementation of the Financial Services Cloud. Our methodology is based on a decade of Salesforce delivery, and tailors the traditional software lifecycle to the unique attributes of the platform. Our approach emphasizes iteration and collaboration, refining requirements through rounds of workshops with multiple stakeholder groups.
- **Defined Wealth Management Best Practices.** Advisor Focus supports best practices like gap analysis, so you can focus your efforts on building value-added features unique to your business.

Firms using the Financial Services Cloud, when correctly customized and integrated, can better collaborate internally with sharable, accurate information.

[Learn more](#)

Solution Overview

LIQUIDHUB ASSET MANAGEMENT



The LiquidHub Asset Management solution supports sales, client service, and marketing for both institutional sales and intermediary wholesaling.

THE SOLUTION:

- Integrates industry best practices, years of industry expertise specific to asset management, the Salesforce platform and Salesforce1 Mobile App
- Supports integration with most commonly used third party systems in the industry (portfolio management, sales data, Microsoft Outlook, etc.)
- Offers a full suite of CRM transformation services — architecture design, implementation, data integration, QA, training, and support — and a large degree of flexibility that can be molded to suit each firm's unique structures and business processes

BENEFITS

LiquidHub Asset Management helps institutional and intermediary sales, client service and marketing be more effective by:

- **Minimizing.** Minimize custom work and accelerate delivery.
- **Providing.** Provide end-to-end solutions with a truly seamless implementation process since the bulk of the configuration is in place.
- **Implementing.** Implemented quickly, so firms can focus their efforts on building value-added features unique to their business.

The LiquidHub Asset Management solution is intended to be used as a starting point for firms that wish to further customize the CRM solution to suit their specific needs. The pre-built features included in the solution are focused on three key areas: Relationship Management; Sales Support; and Data, Measurement & Analytics.

[Learn more](#)

Solution Overview

MAGNET 360 AGENT CONNECT



Magnet 360 Agent Connect is the key to keeping up with digitization and changing customer requirements. It's easier to capitalize on industry trends and address core challenges so you can differentiate, streamline and expand your business.

THE SOLUTION:

- Is built to meet insurance companies' distinct needs
- Combines Magnet 360's financial services industry experience with Salesforce's deep multi cloud capabilities
- Provides Salesforce Marketing Cloud resources

Agent Connect enables “engagement for outcomes” to drive measurable results for your business.

BENEFITS

Agent Connect creates value in agent productivity, improved marketing and more accurate journey definition:

- **Agent Productivity.** Reduce time spent looking for information with a 360-degree view of customers and independent agents, so there's more time for selling. Hierarchy, performance and opportunity tracking save additional time.
- **More Data.** Performance dashboard and reports create a data foundation for marketing automation and better collaboration between sales and marketing. Increase your use of one-to-one multi-channel marketing (email, Web, social) to target customers and increase sales. Outreach is focused on activation and conversion through nurture campaigns, optimized content, and lead scoring and grading.
- **Journey Definition.** Map the agent hierarchy and journey to existing technology platforms to view interactions, nurture relationships, and measure agent acquisition and retention.

[Learn more](#)

Solution Overview

PWC WEALTH MANAGEMENT



The PwC Wealth Management solution combines PwC's robust industry knowledge with Salesforce's proven cloud-based and mobile tools. It adds value to your business by identifying new ways to compete, improving your knowledge of client relationships, maximizing the most profitable customer relationships — and doing it all without a significant spend on improvements to your existing infrastructure.

THE SOLUTION:

- Is designed specifically for the wealth-management industry
- Leverages cloud technology to produce efficiencies and improve service
- Enables collaboration to increase competitive advantage

PwC Wealth Management increases your ability to deliver high-value services to your most valuable customers, powered by a highly efficient back-end.

BENEFITS

With PwC Wealth Management, you're well positioned to reduce costs, increase staff productivity and gain crucial market share through improved client satisfaction:

- **Reduce Costs.** Use the cost-effective cloud to reduce your reliance on the IT stack, so upgrades and maintenance are centrally managed, rapidly deployed and less expensive.
- **Productivity.** Customizable tools facilitate collaboration and increase transparency, giving the entire team a 360-degree client view. You can also set goals, track progress, review your book of business and monitor the pipeline. Mobile integration lets you work from your tablet or smartphone.
- **Satisfaction.** The unified client view enables you to anticipate and address opportunities and issues, increasing your value to the customer. Create, deliver and track client communications, such as subscriptions, invitations, special occasions, etc., from one central location.

Only slightly more
than half (51%)
of intergenerational
clients remain with
their family's original
wealth adviser.

[Learn more](#)

Solution Overview

SILVERLINE BANKER360



Silverline's Banker360 changes the way you interact with customers by aggregating data from multiple systems into a single 360-degree view of the customer relationship. You gain a competitive advantage through cutting-edge technology that removes inefficiencies from typical sales, service and operational activities, and drive action through analytics.

THE SOLUTION:

- Is designed to address the specific needs of banks and financial services companies.
- Empowers collaboration and cost efficiencies with a cloud-based, mobile- and social-enabled solution
- Blends Silverline's deep industry experience with the Salesforce Customer Success Platform

Silverline works with banks to review current sales management practices and operational processes, and provides feedback based on industry best practices that accelerate time to market.

BENEFITS

Banker 360 enables you to be more competitive and responsive, creating a faster time to market with:

- **Streamlined Onboarding.** Equip employees with a single view and understanding of each customer's and household's information, and when to engage. Banker360 also integrates to Core Systems providing increased visibility and effectiveness.
- **Sales Insights.** The solution enables more effective sales management and performance with lead, opportunity lifecycle and pipeline management; customer tiering and outreach workflow; and insights into next best offer and propensity to buy.
- **Referral Management.** Effectively manage internal and external referrals while identifying opportunities for cross-selling and referrals to other groups beyond retail banking.

[Learn more](#)

Solution Overview

SILVERLINE WEALTH MANAGEMENT



The Silverline's robust Wealth Management Solution manages client relationships while integrating with portfolio management and financial planning applications, allowing advisers or relationship managers to have a 360 degree view into their book of business through a single pane of glass.

THE SOLUTION:

- Is custom-built for wealth-management relationship managers
- Leverages Silverline's extensive experience in the industry with Salesforce's recognized cloud-based technologies
- Creates a technology environment that's more agile and effective without a total redesign

Investing in this solution improves your firm's productivity and retention, enabling you to meet key goals for growth.

BENEFITS

The cloud-based tech layer of Silverline's financial-services solution delivers high levels of service necessary to secure retention and drive new revenue opportunities through.

- **Seamless Integration.** The solution is customizable to your unique business processes and external applications. Eliminate inefficiencies across the firm with autogenerated client emails and other processes. It uses social and mobile capabilities to encourage real-time collaboration for better workflows.
- **Client Retention.** Consolidate all your client information into a single, organized data source, including notes, documents and activities. This gives employees the power to deliver a high-touch experience informed by personal and contextual knowledge. Create tailored client proposals and reports faster to provide more value to existing and prospective clientele.
- **New Revenue Opportunities.** Use the process efficiencies and automated marketing and communication tools to identify new high-value clients and produce high-quality sales materials that get results.

[Learn more](#)



CHAPTER 5

GOVERNMENT



INDUSTRY OVERVIEW

GOVERNMENT

Access to mobile, social and Web technology gives new meaning to President Lincoln's phrase, "government of the people, by the people, for the people."

These trends drive Government 2.0:

- Tighter budgets require better use of technology and a more integrated approach to managing systems and government operations — and citizens expect better stewardship of their tax dollars.
- Other industries' focus on customer engagement and relationships has accustomed citizens to more personalized, one-to-one relationships that many government agencies can't provide.
- Aging technology infrastructures prevent many new technologies and efficiencies from being introduced and exacerbate stereotypes about government bureaucracies and redundancies.

"We built 100+ apps with Salesforce to help government be more agile and nimble."

- Sonny Hashmi,
Chief Information Officer, GSA

INDUSTRY OVERVIEW

GOVERNMENT

Changing the way government functions requires a set of solutions that brings officials closer to citizens while easing the burdens of bureaucratic red tape and duplication.

- **View Citizens as Customers.** Governments are more effective when they adopt a customer service mentality. With CRM solutions, you learn about citizens' preferences for giving and receiving information, requesting services and documents, and doing other kinds of business with you. And although the phone remains a primary mode of engagement for most citizens, they don't always want to call, so engage with them via social and mobile, too.
- **Create the One-Stop Shop.** Ease the inefficiency and frustration customers and employees face when dealing with bureaucratic barriers among agencies and service areas. Deploy a unified and flexible technology platform in the cloud to enable workers to collaborate on service provision and problem-solving, and empower

any government worker to quickly provide answers, insights and assistance. Enabling self-service opportunities allows citizens to perform many simple tasks themselves, freeing up staff to focus on more important matters.

- **Migrate Solutions to the Cloud.** With many different systems and varying degrees of mobile — and Web-readiness, a cloud-based platform is the easiest way to create customer service and operational efficiency. Whether you choose an incremental deployment or a larger system integration, working in the cloud wipes out the problems created by siloed legacy systems.

Changing the meaning of “government work” is possible with a unified technology platform that makes possible higher levels of transparency and service. Take a look at some cloud-based solutions designed specifically for government use.

[Learn more](#)

Solution Overview

ACUMEN SOLUTIONS, INC. CORRESPONDENCE MANAGEMENT



With so many ways to communicate, information and requests can get lost in the shuffle or end up with the wrong person. With Acumen Solutions' Correspondence Management, government agencies can effortlessly manage the tremendous volume of correspondence through all channels — social media, paper mail, telephone, email, and more — in one unified cloud system.

THE SOLUTION:

Acumen Solutions' Correspondence Management solution makes it easy for government agencies to collaborate with their personnel and other agencies using tools that:

- Are designed especially for the government sector
- Leverage our long-term sector experience with the power of Salesforce Marketing Cloud and Service Cloud
- Enable omnichannel communication and coordination, including social and mobile, to allow you to listen to your constituents

Correspondence Manager allows you to respond quickly and correctly, giving you the ability to capture, organize, and track the status of communications; and to ensure all correspondence is addressed and handled correctly.

BENEFITS

Acumen Solutions' Correspondence Manager streamlines operations to improve workflow, collaboration and responsiveness:

- **Workflow.** Other programs work in tandem with SFDC to pull various correspondence from all channels to filter and sort them accurately, making it easier for the correct team or individual to respond to the sender. Streamlined approval processes enable a faster path to resolution and response. The solution also enables you to monitor and manage performance at all levels.
- **Collaboration.** Break down silos and ensure consistent service across channels to significantly improve your interaction and collaboration. With Chatter, government employees can share information, ask questions, and post ideas and get real-time feedback and responses from individuals within the organization. By imbedding Goggle Docs into the Salesforce interface, the solution provides a centralized view of documents and assignments so internal and external users can collaborate directly. You maintain version control, customize user permissions, and maintain a history of who has reviewed, edited or made changes to your files.
- **Responsiveness.** Correspondence Management uses powerful logic and workflow to ensure that each correspondence is sent to the correct person the first time. The system dramatically improves your agency's ability to manage the correspondence pipeline, reducing the number of days it takes to respond to correspondence by 49%.

[Learn more](#)

Solution Overview

BLUEWOLF APPEALSTRAK



Bluewolf's AppealsTrak for unemployment insurance is a complete appeals process management system built on the Salesforce1 Platform. With AppealsTrak, agencies across the country can quickly and securely streamline the UI appeals process, reporting and management in order to stay in compliance with USDOL performance measures and ultimately improve citizen experience.

THE SOLUTION:

- Is engineered specifically to improve UI appeals administration
- Blends our insurance industry experience and knowledge with the Salesforce portfolio of cloud-based solutions
- Enables you to leverage efficiencies with automation and cloud- and mobile-enabled functionality

BENEFITS

The solution enables you to improve the user experience for citizens and staff through:

- **Efficiency.** Reduce average processing times for appeals and the overall case inventory with a streamlined end-to-end process. You can even update processes without disrupting your day-to-day operations.
- **Compliance.** Accurate and automated USDOL reporting makes it faster and easier to stay in compliance with federal statutes and time-lapse standards reporting.
- **Communication.** The 360-degree view of the entire appeal process enables clearer and faster communication about claim/appeal status, hearing scheduling, next steps and aging.

[Learn more](#)

Deloitte Digital Citizen Connect is a next-generation engagement platform to provide fully integrated capability to access government services. Citizens, businesses, constituents and government resources engage through stream lined processes and shared data to create a single user experience across traditional silos of government. It erases the expectation gap with a cloud-based portfolio of solutions that connects silos, produces a 360-degree view, decreases duplication of effort, and improves operations and satisfaction.

THE SOLUTION:

- Is engineered specifically to improve UI appeals administration
- Blends our insurance industry experience and knowledge with the Salesforce portfolio of cloud-based solutions
- Enables you to leverage efficiencies with automation and cloud- and mobile-enabled functionality

BENEFITS

Citizen Connect creates measurable value for government agencies by improving digital government experiences, reducing duplication of effort, and improving outcomes for both government entities and constituents such as citizens and business users:

- **360-Degree View.** Construct a comprehensive view of constituents for a one-stop-shop capability. This reduces duplication of effort and creates a smooth self-service-enabled experience.
- **Agency Collaboration.** The solution fosters collaboration between agencies with integrated process alignment capabilities.
- **Data.** Improves data quality via reduced number of disparate data management touch points. Data is secured and updated within process journey maps. Digital engagement enables changes to be managed timely with less effort, and more accuracy.

[Learn more](#)

CHAPTER 6

HEALTHCARE & LIFE SCIENCES



INDUSTRY OVERVIEW

HEALTHCARE & LIFE SCIENCES

Innovation. Collaboration. Improved outcomes. These are the watchwords for the healthcare and life sciences industries today. Technological advances are moving each of these forward at an accelerated pace, blurring the lines between sales, service and marketing functions and processes; traditional industry roles; and corporate boundaries.

Many organizations struggle to address these important industry trends while providing exceptional care and developing innovative solutions:

- Big Data could provide insights into trends, connections and innovations missed on a smaller scale, if only you could aggregate and mine it quickly and effectively.
- Patients are in the driver's seat now that they have more choice in healthcare services, making easy-but-secure access to health records and delivery of personalized care a requirement.
- Policy makers focused on controlling costs and providing care to expanding and aging populations leading to value and outcome-based payment models

Solutions for a new
era of connected,
personalized medicine.

INDUSTRY OVERVIEW

HEALTHCARE & LIFE SCIENCES

To capitalize on these trends, you need a single customer-success platform that empowers you and your team to collaborate, manage work and deliver patient-centric care more effectively.

- **Collaborate to Drive Innovation.** Advances in the diagnosis, treatment and prevention of common ailments and serious conditions will come from multidisciplinary, cross-institutional and nontraditional collaboration. Cloud solutions make it easier to work together, track research, adhere to regulations, and get to the bedside or market faster.
- **Enable a 360-Degree View.** Increased visibility and transparency are vital to better patient care and scientific advancement. Aggregating and monitoring clinical and nonclinical data about individual patients from increasingly disparate systems and connected devices helps you understand more about conditions, behaviors and outcomes so you can provide more targeted, personalized solutions. With data in one location, your team coordinates care more effectively, researches more easily, and gathers and processes data from devices and other sources more efficiently.
- **Use Technology to Engage More Effectively.** New technology promotes staff and patient engagement as never before via data gathered from wearables, health workers using tablets in the field, personalized reminders about care plans, and even conversations fueled by social media or communities. This increased engagement

before, during and after care is the key to establishing a more personalized, engaged and connected way of doing business that better serves patients and supports the shift to value-based models.

- **Use the Cloud to Mine Big Data.** Siloed IT systems and a flood of information from EMRs, wearable technology and other sources can overwhelm your efforts to monitor and improve patient outcomes in a cost-effective manner. A cloud-based solution enables faster and better data gathering, analysis and collaboration that is secure but accessible by an extended group — patients, medical and office teams, and caregivers. With the cloud, you leverage the promise of Big Data without incurring the expense of retooling a legacy system.

This is a time of extraordinary promise for new discoveries that will improve the quality of life for millions. See how your healthcare organization or life sciences company can leverage tailored cloud-based solutions to seize this important opportunity.

**Learn More
about Healthcare**

**Learn More
about Life Sciences**

The Accenture Connected Physician Solution adds value by providing healthcare providers (HCPs) access to information on diseases, treatments, products and training; and encourages collaboration with other doctors and medically trained pharmaceutical experts.

THE SOLUTION:

- Is designed to improve engagement between HCPs and pharmaceutical companies
- Combines Accenture's strong life sciences practice with Salesforce's proven technology
- Enables cloud-based omnichannel access for HCPs to critical information from any device at any time

Connected Physician is a critical tool for creating more effective patient interactions and outcomes and is part of the patient engagement component of the Accenture Intelligent Patient Platform.

BENEFITS

Accenture Connected Physician Solution addresses changing market dynamics with value-added content delivery, targeted marketing and better technology:

- **Added Value.** Give physicians the information they need in the format they want: Educational and training videos, product information, Chatter groups, and news on interests and therapeutic areas with automated event reminders.
- **Targeted Outreach.** Connected Physician improves access with social and marketing tools that reflect interests and preferences and drive loyalty and brand awareness. Create communities, deliver a consistent experience and reuse marketing materials across all channels and markets.
- **Technological Advantage.** The multi-channel desktop and mobile solution integrates quickly with existing Veeva solutions and is a component of Salesforce's overall HCPConnect vision. The mobile solution uses a responsive HTML5 app, so it's compatible with iPads and iPhones.

Physicians spend eight hours a week online versus 2.5 hours with reps.

Ninety-six percent of physicians use the Web for health, medical and prescription information, and more than 50% say online information affects what they prescribe.

[Learn more](#)

The Accenture Health Experience Platform provides next-generation tools and processes for improved retention and growth for the Individual, Group and Medicare segments. Providing a holistic view of each customer, it's an integrated solution that streamlines sales, marketing and service.

THE SOLUTION:

- Blends Accenture's strong healthcare industry knowledge with the proven Salesforce platform
- Addresses payers' chronic pain points
- Enables cloud-based, mobile-enabled access

Accenture has developed multiple assets and tools for rapid project delivery at lower risk.

BENEFITS

The Accenture Health Experience Platform provides more efficient, end-to-end processes that enable:

- **Customer Targeting.** The Customer Service Solution's digital forum assists individuals shopping for health plans. Track website behavior, as appropriate, to present options based on each prospect's actions and interests. Enable tighter integration between sales and marketing to improve lead conversion ratios and reduce sales cycles.
- **Broker Engagement.** The Broker Solution helps manage pre- and post-sales processes effectively to better identify the right health plan options for customers and to provide quotes more easily. Increase broker satisfaction with streamlined processes and better access to information.
- **Better Service.** The Service Agent Solution enables insight-driven support via a 360-degree member view based on demographic, health plan, utilization and interaction history across channels. Increase first-call resolution, reduce average handle times and boost customer satisfaction.

The solution's proprietary assets help accelerate time to market and reduce delivery time by up to 25%.

[Learn more](#)

The life sciences and pharma industries now strive for outcome-based solutions “beyond the pill” to meet patients’ new expectations. The Accenture Intelligent Patient Platform uses integrated patient services and solutions to produce better patient care and satisfaction.

THE SOLUTION:

- Is custom-designed for the pharma industry
- Leverages Accenture’s extensive client experience with Salesforce’s proven patient-satisfaction platform
- Uses cloud, mobile and social technology to improve business operations and patient outcomes

The Accenture Intelligent Patient Platform is configurable to your specific needs and currently includes four standalone applications:

- Patient Onboarding Contact Center
- Patient Adherence Contact Center
- Connected Physician Solution
- Mobile Nurse

BENEFITS

The Accenture Intelligent Patient Platform improves business operations and patient care through:

- **Comprehensive Patient Views.** See the entire patient history and adherence data via easy-to-use dashboards. Health-outcomes data from devices and EHR are easily integrated so you can measure results, expand knowledge of therapies, identify improvements and assess adherence risk.
- **Streamlined Workflows.** Collaborative case-management functions make enrollment, access and reimbursement faster and more accurate. Encourage collaboration with automated task scheduling and coordination. The Mobile Nurse Solution empowers the care team to track patients, physicians and tasks via iPad. Optimize workflow by monitoring, tracking and scheduling nurse-patient interactions.
- **Financial Performance.** Increase revenue with better patient satisfaction and adherence, and decrease business operation costs with more efficient scheduling, workflows and IT spend. This cloud-based, mobile-enabled solution also reduces the costs of integration and upgrades with a subscription model that delivers automated updates.

76% of patients think pharmaceutical companies have a responsibility to provide information and services that complement the products they sell.

[Learn more](#)

Solution Overview

DELOITTE DIGITAL MEDICAL INFORMATION MANAGEMENT ACCELERATOR



MedConnect is Deloitte Digital's accelerator for medical information management in life sciences companies. It makes medical information easily accessible in a consistent, regulated manner on a global basis to provide patients with effective care..

THE SOLUTION:

- Is designed specifically for medical information/inquiry management capability within the life sciences industry based on Deloitte's extensive knowledge and experience
- Allows capture of medical information requests from multiple channels such as websites, call centers, CRM systems, mobile devices, etc.
- Provides strong content review and approval capabilities to manage medical content, and is built on Salesforce Service Cloud.
- Addresses a number of challenges with legacy medical information response management platforms

The MedConnect accelerator enables core business capabilities on a single platform to meet the requirements of the challenging medical affairs landscape.

BENEFITS

MedConnect makes medical information management more effective with streamlined processes, innovative technology, lower operating costs and a more complete view of each customer:

- **Streamlined Processes.** MedConnect helps eliminate double handing of data, reduces manual processes, and automates authoring, review and approval workflows. It significantly decreases response time, and refocuses resources on more strategic activities. Core business processes and medical information are shared across affiliates to enhance the reusability of standard content.
- **Innovative Technology.** MedConnect is a highly scalable, cloud-based solution built on the Salesforce Service Cloud. There is no hardware or software needed to manage the solution and it can be easily deployed across affiliates and around the globe. The design of the solution allows better integration across all systems.
- **Lower Operating Costs.** MedConnect is a single platform which consolidates the technology footprint and decreases total cost of ownership.

[Learn more](#)

Solution Overview

DELOITTE DIGITAL PATIENTCONNECT



The shift to value in the healthcare and life sciences industry is dramatically changing the way you do business. Creating a compelling customer experience is now as important as creating a compelling product. Deloitte Digital PatientConnect provides the tools you need to bridge the digital gap between you and your customers.

THE SOLUTION:

- Transforms the model to include social, mobile and analytics capabilities via the Salesforce platform
- Is built specifically for the healthcare industry based on Deloitte Digital's broad experience
- Speeds integration with proven cloud-based solutions that sit on top of your current IT stack

PatientConnect empowers you to interact with patients in an effective way that drives both business and healthcare results.

BENEFITS

Deloitte Digital PatientConnect builds value with:

- **Predictive, Outcome-Based Engagement.** Collect and analyze patient insights to facilitate coordination, increase the value of real-world evidence and improve patient outcomes. Easy access enables patients to receive educational and support services at key moments, encouraging compliance and getting results.
- **Streamlined Operations.** Shared core business processes and coordinated patient interactions throughout the organization increase productivity. Automated forms enable data population between the system, reducing errors and data-entry time. Improved integration across platforms and programs decreases processing time and manual tasks.
- **Cloud Capabilities.** Accelerate time-to-value with this cloud-based solution, which is more nimble than a traditional IT infrastructure. The subscription model includes automatic technology upgrades so you can budget time and funding more easily and free up staff to address other issues.

“My care coordination workflow is centralized, providing a holistic view of all my patients’ activities, results and progress. I have access to powerful insights into ‘at risk’ patients, as well as timely suggestions for patient reach-out and care interventions.”

[Learn more](#)

Solution Overview

DELOITTE MEMBER CONNECT



Deloitte Member Connect is an industry-focused accelerator that helps health plans address core customer engagement and marketing.

THE SOLUTION:

- Is designed to address the specific challenges and shortcomings of health plan customer engagement
- Combines our extensive healthcare know-how with 49 solutions from the Salesforce portfolio
- Provides an intuitive, innovative approach to the member journey

Member Connect's advanced functionality brings real value to members so you can write more business.

BENEFITS

Deloitte Member Connect is a digital engagement platform that can improve sales and marketing effectiveness and increases customer service satisfaction on a cloud-based technological framework. The solution enables:

- **Effective Marketing & Sales Engagement.** In an increasingly competitive marketplace, clients need to grow and retain membership at a faster pace than ever before. Member Connect takes the first step with automated marketing and sales support, and enables cross-selling, up-selling and guided selling based on organizational methodology. Its complete member view powers accurate segmentation and social media management and analytics.
- **Innovative Customer Experience.** Sixty-eight percent of customers stop doing business with a company because of bad service. The solution powers top-shelf customer service across multiple channels to engage members and build deeper relationships that engender trust and loyalty, and directly affect retention.
- **Consumer-Driven Innovation.** New entrants are disrupting and traditional Health Plans with better capabilities, more convenience, and higher quality customer experience. Member Connect takes a consumer-driven approach to Health Plans to identify opportunities where we can drive innovation and provide the level of service and experience members are increasingly looking for.

[Learn more](#)

Solution Overview

HIGHPOINT SOLUTIONS CLINICAL TRIAL DESIGN MEMORY TOOL



Lacking a mechanism for capturing and leveraging re-usable data relating to the design and management of trials, CROs waste time and resources planning and executing every trial from scratch. This solution enables organizations to identify and deploy insights and best practices efficiently from one trial to the next.

THE SOLUTION:

- Combines HighPoint's extensive industry knowledge and expertise with Salesforce's powerful and proven solutions
- Is expressly designed to meet the unique needs of the clinical trials industry
- Standardizes processes and facilitates collaboration via a cloud-based, mobile- and social-enabled solution

The Clinical Trial Design Memory Tool helps information sharing during trials development and ensures usability that improves productivity without disruption.

BENEFITS

Roll out new clinical trials based on the experiences and insights captured in previous trials, via:

- **Data Capture & Access.** The tool enables you to collect any kind of structured or unstructured data relating to the development, management and execution of a clinical trial. The best practices from past experiences become the framework upon which new trials are launched. This reduces time and improves data quality and resource utilization.
- **Collaboration & Coordination.** Rich collaboration capabilities improve communication and support efficiency. Better coordination aligns roles and responsibilities and simplifies SOPs.
- **Standardized Processes.** The solution offers uniform reporting that eliminates replication of data and redundant content-gathering efforts.

“HighPoint’s Design Memory Tool allows us to leverage our existing usage of Salesforce.com to provide a solution to a persistent problem. The tool was easily adopted by both operations as well as IT as the Salesforce.com platform is intuitive and easy to use and the necessary support structures were already in place.”

[Learn more](#)

Solution Overview

MAGNET 360 MEMBER ENGAGE



The Magnet 360 Member Engage solution provides payers with a streamlined and innovative framework for accelerating marketing programs and nurturing activities.

THE SOLUTION:

- Is built to meet payers' distinct needs
- Combines insurance industry experience with Salesforce's deep multicloud capabilities
- Provides Salesforce Marketing Cloud resources

Member Engage enables you to easily and cost-effectively customize and personalize marketing outreach and member nurturing.

BENEFITS

Member Engage creates value for your organization by leveraging technology to drive customer allegiance and improve financial performance.

- **Technology.** Better member engagement requires better technology. Member Engage is a multicloud, social and mobile platform that upgrades your capabilities without requiring extensive retooling of current hardware and software. That speeds deployment time and keeps costs low.
- **Engagement.** Magnet 360 Member Engage lets you listen to, engage with and nurture customers. Its multi-channel tools build trust with the brand, facilitate member onboarding and improve retention. You better understand the member journey and how and where to interact for greatest effect. Easily gather data on brand sentiment, share of voice, competitor activities, general healthcare topics and social conversations.
- **Performance.** With better data gathering and analysis, you have access to real-time insights to inform business decisions. Marketing automation and streamlined processes allow you to track and convert more efficiently and to reduce case time to increase productivity.

[Learn more](#)

Solution Overview

MAVENS CONSULTING IDENTITY AND CONSENT MANAGER



Gain new visibility into customer activities across multiple channels and gauge their interests beyond direct interactions. Mavens Consulting's Identity and Consent Manager provides a single platform that gives health care providers, consumers and patients an easier path to initiate and maintain relationships.

THE SOLUTION:

- Is solely focused on the specific requirements of the health care and life sciences industries
- Blends Mavens Consulting's deep domain experience with Salesforce's Customer Success Platform
- Uses cloud-based mobile- and social-enabled capabilities to improve communication and collaboration

Identity and Consent Manager makes it easier to track, monitor and improve customer experiences and satisfaction regardless of channel or platform.

BENEFITS

Identity and Consent Manager empowers global multi-channel identity and consent management with:

- **User Experience.** The simple point-and-click interface enables you to create dynamically branded pages that are easily integrated into existing portals and solutions. Build a seamless and consistent user experience across all channels and platforms.
- **Management & Tracking.** The secure single sign-on capability facilitates identity, authentication, authorization and permissions management. It also enables flexible consent management and storage for tracking opt-in/opt-out across channels.
- **Integration.** The solution supports SAML, OAuth, OpenID Connect and social login support along with best of breed REST APIs to enable integrations to solutions.

In a self-assessment of readiness for multi-channel marketing pharmaceutical companies scored on average 36% whilst no surveyed organization planned to reduce their multi-channel budget.

[Learn more](#)

Solution Overview

MAVENS CONSULTING MEDINFO CALL CENTER ACCELERATOR



Healthcare providers and life sciences companies are racing to create value-focused digital engagement with patients. The Mavens Consulting MedInfo Call Center Accelerator helps leverage technology to better manage inquiries and content.

THE SOLUTION:

- Is tailor-made for global healthcare and life sciences contact centers
- Features best-of-breed technologies to optimize processes and communications
- Harnesses the power of the cloud to provide automated upgrades and easy integration

Mavens Consulting MedInfo Call Center Accelerator enables contact through multiple channels, and better data gathering and management.

BENEFITS

Mavens Consulting's MedInfo Contact Center Accelerator provides better service to HCPs, consumers and field staff, and greater visibility across channels with:

- **Capability.** Capture data from every channel — online, email, phone, device and Veeva iRep — to streamline processes and create a complete view of products and patients. These same channels can be used to send information to anyone.
- **Compliance.** Monitor complaints to provide better patient support. Built-in communications and information empower you to deliver personalized and relevant messaging, alerts and product information. These assets help patients stay on track and improve outcomes.
- **Data Privacy & Analytics.** Built-in privatization ensures sensitive information is properly handled and protected. Real-time dashboards and reports make it easy to analyze data related to inquiry and content KPIs.

[Learn more](#)

Solution Overview

PWC PATIENT DIGITAL CARE



Our Patient Digital Care (PDC) solution is a set of digital tools to innovate care delivery and bridge the gap between healthcare providers and consumers.

THE SOLUTION:

- Is designed to meet the specific needs of healthcare providers
- Reflects PwC's demonstrated industry expertise and Salesforce's proven solution portfolio
- Uses the cloud to meet the needs of your practice and workforce

PDC enables integrated patient-centric capabilities that optimize people, process and technology.

BENEFITS

The PDC solution accelerates your ability to improve patient communication and support, create smarter workflows, and adopt mobile and cloud technology.

- **Patient Communication, Support & Satisfaction.** With PDC, you maintain meaningful, personalized connections with patients from pre-care to post-care. This improves patient outcomes and satisfaction, resulting in increased reimbursement.
- **Efficient Workflows.** The solution includes pre-built and configurable templates that provide functionality, information and services tailored to your particular strategy, processes and preferences. These options allow you to respond more quickly to patient care and support needs, including financial resources and specialists.
- **Mobile & Cloud Options.** PDC makes content cost-effective and easy to access while maintaining consistency and continuity throughout the entire treatment process. The solution is easily customized and deployed for faster development cycles, end-user engagement and system integration at a lower cost than traditional software solutions.

[Learn more](#)

The majority of patients' interactions with healthcare organizations are with call-center staff, not with clinicians. The Silverline Patient Contact Center evolves the patient-service experience to empower hospitals and providers' agents to offer comprehensive, empathy-driven care and support.

THE SOLUTION:

- Combines Silverline's experience in the healthcare industry with Salesforce's Customer Success Platform
- Is designed to address the specific needs of hospital and healthcare call centers
- Harnesses the power of cloud-based, mobile-enabled functionality to help providers deliver patient-centered service

The Patient Contact Center centralizes and standardizes customer-service operations on one platform so you can make data-driven decisions and provide best-in-class service to patients.

BENEFITS

The Patient Contact Center facilitates patient-centered support services with:

- **360-degree View.** Productivity and service are improved with a unified patient profile. Collect disparate patient data from different platforms and business units onto one screen, including prior interactions and key activities. Drive more comprehensive dispositioning and case management.
- **Efficient Workflows.** The solution provides a framework to embed other workflows, such as referral management, scheduling and insurance verification, so agents work faster with fewer errors. Enhance task-management capabilities across internal team members. Manage knowledge articles and call scripting to facilitate guided call interaction.
- **Call-center Improvements.** The Patient Contact Center provides call-center agents with tools and information in an easy-to-access format so they can quickly field patient requests and take immediate action. Provide a personalized and streamlined support experience so patients worry less about their calls being rerouted and focus more on their health and treatment plans.

[Learn more](#)

CHAPTER 7

MANUFACTURING AND AUTOMOTIVE



INDUSTRY OVERVIEW

MANUFACTURING AND AUTOMOTIVE

Field of Dreams' "If you build it, they will come" could easily apply to traditional automotive and manufacturing companies. But new technologies and a move to personalized experiences and products are changing the way successful companies in these industries operate.

These trends illustrate that building it is no longer enough:

- Customers don't just want factory options, they want options designed and configured with them in mind, requiring manufacturers to know them better.
- Technological advancements make it possible to connect vehicles, equipment and products to the factory and customer support to facilitate maintenance, service, innovation and CRM.
- Social media makes it easier for customers to ask others for recommendations, and the Web makes it faster to be an educated consumer — creating a new buy/sell cycle.
- The market now assumes rapid iteration of existing products and new product innovations that change the game for everyone.

"Data is good,
but real-time
information from
Salesforce is better."

- Beth Comstock CMO, GE

INDUSTRY OVERVIEW

MANUFACTURING AND AUTOMOTIVE

Winning in the new customer economy requires manufacturing and automotive companies to develop a new way of doing business.

- **Form Direct Relationships.** Today's customers want one-to-one relationships with the companies they do business with. They don't see sales and service as different divisions, so they expect cohesive and unified communications. They want personalized attention whether they're interacting with your brand on social media or walking the showroom floor.
- **Enable Connectivity.** "Always on" may be a cliché, but customers demand connectivity, whether it's in their cars or in their stockrooms. Enabling your products to "report" back to you is important, but so is enabling users to connect to mobile, social, Web, cloud or on-premises solutions that manage core business or personal activities.
- **Engineer Collaboration.** Command and control is out. Leading manufacturers now favor collaboration with suppliers and among divisions. Rapid iteration and experimentation are only possible through a connected ecosystem that facilitates working together regardless of platforms and time zones.
- **Accelerate Change With the Cloud.** Just-in-time is no longer fast enough. In the time it takes to upgrade or rip and replace legacy technology, the current standard is outdated. Cloud-based solutions decrease implementation time and increase speed to value by creating a platform for CRM and collaboration that's incrementally deployed. Sitting above siloed IT, these solutions improve transparency and enable updates without prohibitive time and spend.

Manufacturing and automotive leaders can stay competitive in this new marketplace by deploying a unified technology stack that's flexible and agile. See the options designed specifically for your industry.

[Learn More
about Manufacturing](#)

[Learn More
about Automotive](#)



Manufacturers struggle to accurately forecast sales. This expensive challenge must be addressed to avoid loss of revenue and carrying excess inventory. Acumen Solutions' Sales Forecasting solution provides a more accurate forecast, helping organizations improve lead-times, and increase revenue, unit sales and improved SKU projections.

THE SOLUTION:

The cloud-based solution enables organizations to overcome issues that diminish confidence in sales forecasting data by deploying tools that:

- Blend Salesforce's Sales Cloud, App Cloud and Communities Cloud platforms with our proven industry expertise
- Are designed specifically for the manufacturing sector
- Leverage the power of mobile and social technology

Acumen's Sales Forecasting solution provides management with a clearer picture as to how actual results compare to the sales forecast.

BENEFITS

To be accurate, S&OP and IBP teams require multiple views of customer, operational, statistical, detailed customer EDI and analyst forecasts. Acumen Solutions' Sales Forecasting solution provides that with improved:

- **Visibility.** The solution incorporates orders and actuals into the forecast, allowing sales teams to see future and past orders. It pulls data from opportunity records and creates an accurate forecast that contains multiple accounts and can also build lists. These timely and accurate views optimize inventory levels.
- **Collaboration & Workflow.** S&OP teams can collaborate in real time. The intuitive sales system interface scales to complex organizations with multiple territories, partners and dealers. Sales team members can enter information into forecasts quickly, using both handheld mobile devices and laptops.
- **Automation.** The solution automates the data entry process, reducing manual data entry and producing a more precise forecast. Capturing customer-facing forecasts at higher levels in the product hierarchy is faster and easier because the solution automatically maps to lower level parts.

Sales Forecasting's easy-to-use order-entry user interface lowers time by as much as 60%.

[Learn more](#)

Solution Overview

CAPGEMINI CONNECTED SERVICE EXPERIENCE (CSX)



The Internet of Things (IoT) is profoundly changing the way companies interact with their customers in that it is enabling a post-purchase relationship that did not previously exist. By connecting devices to the Internet, companies can gain insights into product performance and, more important, individual customer behavior.

THE SOLUTION:

- Is designed for manufacturers of automobiles and industrial equipment
- Takes advantage of Capgemini's extensive manufacturing expertise and Salesforce's proven cloud and mobile solutions
- Enables you to realize the promise of the IoT

With Connected Service's enhanced capabilities, you record higher revenue from sales of parts, supplies and consumables while building customer loyalty and increasing satisfaction.

BENEFITS

Capgemini's IoT solution, CSX, empowers manufacturers to monitor product performance and user behavior, predict needs and issues, and trigger the most appropriate preventive interactions in customer care, sales and service.

- **Predictive Ordering.** Monitor usage and anticipate needs for service, parts and supplies, triggering an automatic reorder, adjusting maintenance schedules or launching offers from the sales team by using data from products and centralized customer records.
- **Additional Revenue Models.** Create an opportunity to provide premium services via a Priority SLA at a higher price point or offer remote plant-management services to help customers use equipment more cost-effectively and efficiently.
- **More Value to Customer.** Expand customers' loyalty by offering additional services that make their businesses run more smoothly and effectively, making you a value-added partner, not just another supplier. Streamline flows to address outages or issues and to improve uptime through service optimization for better customer satisfaction.

[Learn more](#)

Thriving in today's fast-changing and increasingly complex manufacturing sales environment requires a new mode of operation. The Deloitte Digital *FastLean* Solution is a unique accelerator designed to help manufacturers improve performance across multiple areas.

THE SOLUTION:

- Is powered by Deloitte Digital's extensive experience in the manufacturing sector and Salesforce's industry leading platform
- Increases productivity through mobile, cloud and Internet of Things technologies
- Enables critical IT upgrades at a faster pace and lower spend

With Deloitte Digital *FastLean*, you can speed time-to-value, globalize operations, enable access and integrate systems and products easily and cost-effectively.

BENEFITS

Deloitte Digital *FastLean* creates value through:

- **Sales Effectiveness.** The 360-degree view of account and opportunity pipelines drives more targeted selling. Automate and streamline operations to enable more visits and higher quote and lead generation via the CPQ engine and visit planning optimization engine. Dashboards and Chatter encourage coaching and collaboration, which improve sales effectiveness.
- **Customer Satisfaction.** Customer needs are more efficiently and effectively met with pre-defined processes for customer care, service management and execution. Measure and assess satisfaction data to build and maintain loyalty.
- **Connection & Collaboration.** The mobile and social capabilities allow you to engage more deeply with customer and partner communities. Use the portal to improve case management and promote collateral-sharing. Online and mobile applications promote cross-functional collaboration.

The *FastLean* accelerator's manufacturing template for sales, service and marketing provides a strong baseline for digital transformations, while having a large impact on the speed of innovation, realization, adoption and business results.

[Learn more](#)

The IBM IoT Customer Experience Platform extends the power of the Internet of Things to manufacturers, merchants, distributors and dealers, empowering you to send personalized campaigns, communications and offers directly through OEM products.

THE SOLUTION:

- Is a pre-built architecture that offers multi-channel delivery (mobile, advisor, online) with the speed, agility and scalability of the cloud
- Extends the multi-channel experience by bringing an ecosystem of content providers and merchants to customers
- Blends IBM expertise and Salesforce technology to provide advanced cognitive capabilities for analysis and personalization

This centralized cloud platform transforms customer interactions and experiences through OEM products.

BENEFITS

The IoT Customer Experience Platform harnesses the power of the IoT and customer experience technology to improve:

- **Revenue Growth.** The Incremental Revenue Generating Platform extends the value of OEM products to consumers and ecosystem partners.
- **Customer Loyalty.** The enhanced product capabilities improve customer experience, enabling you to connect with customers directly and deliver personalized content and offers.
- **Innovation.** The platform tests new offers, collects information and learns, so you can quickly and easily iterate and adjust to meet customer expectations. Using the Application Platform, developers create and customers access brand specific content and offers. The advanced cognitive analytics capabilities provide for offer analysis, personalization, segmentation and behavior analysis.

73% of OEM executives rated mobility services as a significant area for co-creation with consumers.

[Learn more](#)

Solution Overview

PWC INQUIRE TO ORDER



Today's manufacturing sales environment is becoming increasingly complex. Recent trends such as the proliferation of sales channels, changing customer expectations and technology, and competitive dynamics are making it more difficult for organizations to effectively align and manage their sales procedures.

THE SOLUTION:

- Is designed with the specific needs of the manufacturing industry in mind
- Blends PwC's robust industry know-how with Salesforce's confirmed mobile and cloud technology
- Creates improvements across the entire inquire to order process

Add PwC's Inquire To Order helps organizations increase revenue, boost productivity and broaden collaboration.

BENEFITS

Inquire To Order makes your organization more effective with sales force automation and mobility, CPQ optimization, improved visibility into customer data, and easy IT integration.

- **Automation & Mobility.** Sales operations are streamlined with PwC's processes and SFDC workflows and tools. You can track, measure and forecast sales activities, and provide real-time access to the entire process from any device, online or off. This improves reps' productivity and lowers sales response time. Replace manual processes to speed quote and order-management processes and create opportunities to increase order size with customer-specific pricing and quote automation.
- **Improved Visibility.** Increase visibility into the sales pipeline, real-time data and other metrics that enable up- and cross-selling and identify new service offerings. You also have a unified customer view to monitor sales, service and marketing on an individual basis.
- **Easy IT Integration.** Because it's based in the cloud, inquire to order easily integrates into existing solutions for CPQ, collaboration, and social and ERP modules. By sitting on top of siloed legacy stacks, it easily scales across your organization.

[Learn more](#)

Solution Overview

SUNDOG PARTNERDRIVEN



Engage your customers at every step, increase partner engagement and sales, and accelerate your results. Sundog's partnerDRIVEN solution makes it possible by streamlining everything from partner onboarding to lead routing.

THE SOLUTION:

- Is keenly focused on the specific requirements of the manufacturing sector
- Blends Sundog's proven domain experience with Salesforce's Customer Success Platform
- Uses cloud-based, mobile-enabled functionality to increase communication and collaboration

An integrated PRM and CRM solution increases productivity, and the ability to identify issues early improves revenue savings and production.

BENEFITS

partnerDRIVEN produces benefits for manufacturers with:

- **Real-time Insights.** The solution provides better visibility into product forecasting. See direct results from indirect sales channels with the Partner Scorecard so you can drive stronger relationships and revenue. Deliver optimal experience and capabilities for partners with real-time collaboration.
- **Mobile Access.** partnerDRIVEN makes it easier to do business from any device any time. Mobile accessibility, responsive partner tools and dashboards empower staff to deliver better service faster.
- **Program Management.** Partner loyalty and collaboration are increased throughout the journey. Realize efficiencies in your partner-program management, including streamlined lead management and onboarding processes.

“Recently Tige Boats began using this integrated approach and engaging their leads in a whole new way. In the first two weeks, more than 200 new leads entered nurturing journeys. And in the first month alone, they celebrated record-breaking sales.”

[Learn more](#)

Solution Overview

WEST MONROE PARTNERS SERVICE EXCELLENCE SOLUTION



Many manufacturers fight commoditization with better after-market services and customer-centric practices. The West Monroe Partner Service Excellence Solution helps companies get to market faster and gain a competitive edge.

THE SOLUTION:

- Uses West Monroe Partners' extensive understanding of the manufacturing industry and Salesforce's cloud-based technology
- Integrates social, mobile and analytics functions with existing solutions
- Leverages the power of the Internet of Things

West Monroe Partner Service Excellence gives better insight into how customers use products to help you provide better service.

BENEFITS

West Monroe Partner Service Excellence helps companies evolve into customer-centered organizations through:

- **Customer Loyalty.** Retain customers and recruit new ones with more responsive customer service. Integrate ERP data for a 360-degree view of customers, and manage interactions centrally. These activities speed customer service and drive long-term loyalty.
- **Better Service & Management.** Manage work orders, and make better technician assignments so work is completed quickly and correctly. Dashboards provide real-time insight into warranty status and maintenance schedules to deliver preventive and scheduled services.
- **Effective Communication.** Make key information available online and in distributor and customer communities to enable self-service and reduce calls. Identify cross- and up-selling opportunities to better target sales communications. Robust analytics turn product and machine data into actionable information to innovate faster and drive more revenue.

West Monroe Partners acquired Etherios on October 26, 2015. Etherios employees joined West Monroe Partners' existing CRM practice creating a team of more than 125 professionals across the United States focused on conceiving and delivering transformational CRM solutions.

71% of manufacturers use services to differentiate their product offerings, and 44% view value-added services as a critical element of their growth strategies.

[Learn more](#)



CHAPTER 8

MEDIA



INDUSTRY OVERVIEW

MEDIA

Few industries are experiencing as much upheaval and opportunity as the media and entertainment business. Disruptive entrants into the marketplace leverage technology to deliver content, experiences and service in ways that didn't exist when most traditional media companies were already well-established.

The market trends are clear:

- The way content is created, delivered and paid for has changed fundamentally and isn't going back.
- Revenue from advertising and other sources is now viewed from an information-rich point of view.
- Innovative technologies provide deeper insight into consumer behavior patterns and individual preferences.
- Customers are willing to pay a premium to media companies that move quickly to provide personalized content and better service.

“Consumer behavior and consumption patterns are changing, so we’ve got to service those customer needs in very new and different ways.”

- Paul Cheesbrough,
CIO, NewsCorp

INDUSTRY OVERVIEW

MEDIA

Winning in this new environment means driving a personalized, relevant one-to-one customer experience, managing consumers at scale and responding to changing demands at full speed.

- **Develop a DTC Strategy.** Ad revenue continues to decline, yet many traditional media companies still have no strategy to develop direct-to-consumer (DTC) lines of business. That's largely due to a lack of tools. But new customer-success solutions enable you to support DTC relationships and fuel content delivery. Brands using DTC make more from subscriptions, purchases and content than they do from advertising alone.
- **Focus on Individual Consumers.** Demographics drove decisions at media companies for decades. But today's entertainment and news consumers expect a more personalized, one-to-one relationship with all businesses, especially those providing content. New data-gathering and management technologies make it easier for large companies to understand more about individual consumers and

identify larger trends that can be used to develop new products and modes of delivery. In the era of Big Data, the amount and granularity of customer information you can collect, store and leverage is unprecedented.

- **Deploy Cloud-Based Solutions.** The new business model can't function on the old siloed technology stack. Cloud-based solutions enable the rapid iteration, increased personalization and enhanced responsiveness the new market demands. Cloud-based approaches give you more decision-making power over implementation and integration, enabling new functionalities. And they can be built incrementally to create the fastest and most financially viable path to true competitive advantage and increased revenue.

Eager to meet these challenges and opportunities head-on? Take a look at some of the proven cloud-based solutions designed specifically to help media and entertainment companies like yours succeed.

[Learn more](#)

Appirio Media Solution Accelerator changes the way media companies manage, relate to and share with their advertisers, brands and subscribers. It efficiently and effectively delivers key inventory information to employees and customers.

THE SOLUTION:

- Leverages the Salesforce platforms against Appirio's deep domain expertise
- Is specifically designed for companies with inventory sensitive sales cycles
- Accenture's Intelligent Patient Platform is configurable to your specific needs

The solution lets providers utilize a single platform for managing and optimizing sales, subscriptions, delivery and customer service.

BENEFITS

Appirio Media Solution Accelerator works across functions and clouds to streamline ad sales and services transactions end to end with:

- **Increased Visibility.** Better sales rep awareness of inventory drives improvements in deal size. Manage dynamic target ad pricing and yield management in real-time. Ensure unified and streamlined processes across all sales and supporting teams to provide a single view of the customer and accounts with dynamic ad pricing to target key segments.
- **Higher Velocity.** Media customers use the solution to improve deal velocity from weeks to days. Increase deal resolution and accelerate time to market to be responsive and stay competitive.
- **Streamlined Customer Service.** It's critical to provide exceptional customer experience for digital media subscribers. Optimizes subscriber management, CRM, billing and ad case-handling and resolution.

“At Facebook, we take pride in how quickly we deliver innovation and changes in our applications, and the combination of Appirio and the Force.com platform has allowed us to meet those changing business needs.”

-Cole Jimison, Technology Partner, Facebook

[Learn more](#)

Solution Overview

BRIGHTGEN BRIGHTMEDIA



BrightGen's BrightMedia is built to adapt and change with the media industry. Now there's no need to anticipate the next advertising innovation—you just update your rules to accommodate it.

THE SOLUTION:

- Enables a single customer view, multi-platform orders, self-service, reporting and analytics
- Integrates Salesforce into the advertising sales process and is mobile-optimized
- Provides inventory management and product pricing, important for internal ad sales and programmatic trading

BrightMedia is a flexible solution tailored to your exact requirements and built for rapid implementation.

BENEFITS

BrightMedia is configured to fit your business and product set, saving time and empowering you to protect and grow advertising revenue, through better:

- **Visibility.** See all your interactions with each advertiser in one place, so you can check the latest inventory before taking a booking. Monitor KPIs at a glance, and use Wave for analytical data analysis.
- **Accessibility.** Customer portals give advertisers access to your ad sales system. They can maintain their information, see relevant availability and offers, and manage their advertising with you.
- **Efficiency.** BrightMedia produces time and cost efficiencies through increased digital ad sales potential and significantly reduced administration time. Manage advertising orders from quotation through to fulfillment and billing in one seamless process. Set rules in line with your business, create bundles and apply discounts. Empower your sales team to make ad bookings wherever they are with the wizard-based booking process designed for mobile devices.

BrightMedia has enabled us to remain responsive and competitive within a diverse and rapidly changing market.

[Learn more](#)

Successful media companies use cloud-based solutions to know their consumers better and to create marketing and content that meet each audience member's unique needs and preferences where and when he or she wants. Deloitte Digital EngageMe is an accelerator built on the Salesforce1 platform (Sales Cloud, Marketing Cloud, communities, force.com) that enables consistent, effective and targeted marketing and content delivery to support a DTC business model.

THE SOLUTION:

- Is designed to meet specific needs of the media and entertainment industry
- Leverages cloud-based and mobile-enabled technology
- Shifts the traditional business model to a DTC focus

Currency in the digital world is building a direct relationship with consumers and taking what you know about them to deliver products and content alongside a coherent brand experience.

BENEFITS

Using CRM, dynamic app content and digital marketing, EngageMe allows consistent, effective and targeted marketing that drives business metrics:

- **CRM.** Increase loyalty and satisfaction with offers, rewards and reminders based on user profiles, preferences and purchases. These activities also get and keep customers engaged, creating more opportunities to communicate marketing and content updates.
- **Content.** Motivate engagement with personal, pocketable experiences based on a 360-degree view of customer behaviors delivered via customizable reports and dashboards.
- **Marketing.** Enable multi-channel campaigns that increase conversions from prospects to customers and through the lifetime experience with those customers, improving marketing ROI.

Deloitte Digital led intense workshops with our technology, CRM and marketing executives – deep-diving into each relevant customer persona, capturing the art of the possible through their EngageMe offering and then carving out a viable roadmap for this multi-year program.

— Subrata Mukherjee, VP Product Management,
Head of CASE transformation program, The Economist.

[Learn more](#)

Solution Overview

DELOITTE DIGITAL MARKETING RESOURCE MANAGEMENT



Deloitte Digital Marketing Resource Management (MRM) is an accelerator built on the Salesforce1 platform that empowers CMOs to manage creative and finances more effectively, optimize marketing resources, and accelerate the creative process.

THE SOLUTION:

- Is designed specifically for media and entertainment companies
- Blends industry knowledge with tested cloud-based marketing technology
- Supports industry-specific processes

With Deloitte Digital MRM, you better manage the creative and practical details of your marketing operation.

BENEFITS

Deloitte Digital Marketing Resource Management gives you the power to improve:

- **Planning & Financial Management.** Support more programs with the same effort and reduce spend on ineffective campaigns. With MRM Cloud, bottom-up budgeting and estimating and accurate spend-tracking are easier.
- **Marketing Asset Management.** Cut marketing costs and increase output with asset management tools that decrease overall agency spending 10% to 15%, lower cost of rework 70% to 90% and reduce asset search time 30% to 45%. MRM's production-management tools shrink costs for low-result programs 5% to 20% and on unaligned programs 60% to 90%.
- **Performance.** Determine market models based on trends and forecasts to drive 50% to 200% higher response rates and revenue. Align your budget with high-performing programs, campaigns and channels to increase marketing ROI 50% to 100%.

Deloitte Digital's Marketing Resource Management improves productivity 5% to 10%, accelerates time to market 15% to 30% and increases marketing ROI 50% to 100%.

[Learn more](#)



CHAPTER 9

RETAIL



INDUSTRY OVERVIEW

RETAIL

E-commerce was just the beginning. Technology has completely altered the retail business model — even for primarily brick-and-mortar endeavors.

These trends are driving the transformation:

- The lines between physical and digital are blurring as customers use mobile devices to shop online and off and retailers use social and mobile to make recommendations in-store or on the Web.
- Increased competition allows customers to reject retailers who treat them like run-of-the-mill shoppers in favor of those who treat them like high-value clients.
- The rise of the referral economy and online sources of information changed the sales cycle dramatically.

INDUSTRY OVERVIEW

RETAIL

Retailers earn a bigger share of consumers' dollars with a new business model that provides the same quality customer experience across all channels — and creates real value.

- **Create Personalized Customer Journeys.** Technology allows you to help customers when they're not in the store or you're not open. Using social, mobile and Web solutions, you can push deals and incentives, make recommendations, or send greetings via e-mail, text or special content on your website. These activities make it easier for customers to spend more with you, increasing per-customer sales and improving your overall revenue on comparatively little spend.
- **Buy Into Clienteling.** You can no longer afford to group customers into broad, faceless categories. Clienteling is the new term for an old — and effective — way of doing business. You don't have to personally know each customer anymore, but by gathering and using data about preferences, buying history, important dates and more, you can create the one-to-one relationship that keeps customers loyal and compels them to recommend you.

- **Support a Mobile & Social Workplace.** Your customers are using mobile and social technologies, and so are most of your employees. By integrating these technologies into their work, you increase productivity and help staff engage more effectively with customers. Instant access to purchase histories via a tablet or a quick up-sell or an inventory check are the kinds of differentiated services customers adore.
- **Stay On-Trend With the Cloud.** You can't wait for legacy IT systems to catch up any more than you can keep out-of-fashion merchandise on the sales floor. A cloud-based solution unifies isolated technology stacks across your operation with a customer-success layer that deploys and updates quickly. This allows you to experiment and iterate rapidly and to get the benefits of new technology without a full-scale upgrade or replacement initiative.

Winning new customers and securing repeat business in this blended environment depend on technology and agility. Learn about solutions specifically designed for retailers like you.

[Learn more](#)

The Accenture Retail Clienteling Solution is a pre-configured platform that deploys personalized in-store engagement to drive customer loyalty. It enables store associates to build better customer relationships using recommendations that promote brand loyalty, increase sales and improve overall customer satisfaction.

THE SOLUTION:

- Is built to address the specific needs of retail operations
- Integrates Accenture's retail industry knowledge with Salesforce's proven platform
- Delivers a mobile-enabled assisted selling solution to sales associates

The Accenture Retail Clienteling solution accelerates customer loyalty by arming sales associates with actionable insights into purchase history, preferences and wish lists.

BENEFITS

The solution leverages the power of assisted selling to improve customer loyalty using:

- **Multiple Capabilities.** Empower sales associates to be more responsive with instant access to notes, wish lists, preferences, important relationships and dates, and purchase and service history. They can also easily and quickly update records to ensure accurate client profiles and better in-store experience.
- **Unified Solution.** The mobile-enabled omni-channel solution makes it possible to offer fast and device-friendly service in-store, online and via email to increase traffic, encourage repeat business, promote larger basket sizes and create more conversions.
- **Rapid Deployment.** The solution is easy to integrate with existing systems like POS, financial and product/article systems. This gives management and associates immediate visibility into important information required to deliver better support to customers. And the intuitive UI makes ramp-up easy for store associates.

[Learn more](#)

Solution Overview

ACCENTURE RETAIL PERSONALIZATION PLATFORM



Despite attempts at increasing customer loyalty, studies indicate retailers are actually creating *less*. Moving customer sentiment in the right direction requires integration of rewards into the larger in-store and online customer experience.

THE SOLUTION:

- Unites Accenture's deep knowledge of the retail industry and Salesforce's Customer Success Platform
- Harnesses the power of cloud, mobile and social technology
- Reduces time to implement and integrate with existing systems

The Accenture Retail Personalization Platform enables you to deploy a personalization-driven loyalty and rewards strategy that produces results.

BENEFITS

The platform improves your retail operation with:

- **Customer Focus.** With richer data on your customers — including demographics, preferences and histories — you interact more effectively during the customer journey. Tools such as personalized communication, relevant recommendations, gamification and mobile apps make communication seamless.
- **Increased Sales.** Act on easily accessible customer-behavior data to perform better value targeting and strategic segmentation. More efficient co-marketing with suppliers and more effective cross-channel campaigns push transaction volumes and sales amounts higher.
- **Rapid Implementation & Iteration.** Implementation is faster and easier with a pre-configured, quick-start solution that integrates easily with your current IT infrastructure. Automated updates enable rapid iteration without significant spend. The cloud-based solution makes it possible to scale with demand without investing in new internal infrastructure.

**Average time
to implement
is 4 to 6 months
versus 12 to
15 months.**

[Learn more](#)

Solution Overview

ACUMEN SOLUTIONS CONNECTED CUSTOMER SERVICE



Retail customer information is often spread across specialized systems. Acumen Solutions' Connected Customer Service solution transforms order centric transactions into unified customer interactions creating a customer centered view in a modern environment.

THE SOLUTION:

- Directly addresses the traditional obstacles of modernizing CRM in the retail sector
- Combines Acumen's industry knowledge with the proven Salesforce platform
- Connects customer service solutions in a cloud-based, omnichannel solution

Connected Customer Service reduces time spent on the phone or in chat by as much as 25%.

BENEFITS

Improve customer satisfaction and experience with Acumen Connected Customer Service through:

- **Omnichannel Access.** The solution enables retailers to track customer interactions across multiple channels including web, chat and call center, making it easier and faster to have deeper conversations that increase loyalty, brand awareness, sales and conversions. The single, agent-optimized, console increases productivity and reduces training needed for new agents.
- **Clear Visibility.** Agents gain real-time access to consolidated customer sales and service histories, allowing them to offer personalized advice and product recommendations and creating a new revenue channel that produces significant earnings in just months.
- **Easy Configuration & Scale.** The solution leverages real-time bi-directional integration so CRM becomes a 360-degree interactive "layer" on legacy systems. It's easy to reconfigure the solution as needs change to lower maintenance and support costs.

Acumen Solutions brought intense contact center expertise in addition to the Salesforce service cloud implementation experience. They helped B&H go through a successful implementation, and B&H continues to retain them for ongoing work. Acumen Solutions has been a great partner to work with.

[Learn more](#)

PwC Total Retail Clienteling is a portfolio of solutions that creates a seamless 24/7 shopping experience, driving key metrics with a sales-through-service model.

THE SOLUTION:

- Addresses pressing challenges facing today's retail brands
- Builds on PwC's significant work in the industry and Salesforce's well-established technology platform
- Enables total retail transformation with tools and technology that are easy to integrate and use

PwC's Total Retail Clienteling solution empowers leading retailers to accelerate the transition to this new way of doing business.

BENEFITS

PwC's Total Retail Clienteling solution adds value to your operation by connecting customers, employees, products and stores.

- **Connected Customers.** More than 50% of shoppers use social media to interact with a brand, so connecting with your customers via social and mobile channels is critical.
- **Connected Employees.** When associates collaborate, they improve individual and store performance. Enabling them to communicate with one another and arming them with detailed customer data allow them to use those details to drive higher sales per customer and deepen loyalty. Deliver the same high-quality shopping experience online, via social, on mobile and in-store. You can scale more efficiently across all channels and locations to yield stronger returns.
- **Connected Products.** Provide access to product data so associates can suggest alternative or additional items to increase or save a sale. And at the enterprise level, you can spot trends and preferences to make smarter decisions and increase ROI.

[Learn more](#)

Customer experience is now a more valuable differentiator than product line. Slalom Customer. Connect enables retailers to transform the customer journey. Retail is challenged by a lack of comprehensive, consolidated sales, customer and engagement data, which is currently distributed across POS systems, e-commerce systems, corporate data warehouses and the 'black book,' which associates use to manually capture customer/client profile and engagement information and inhibits getting a single, holistic view of the brand's engagement with a customer.

THE SOLUTION:

- Connects consumer interactions across store, catalog, contact center and mobile channels
- Mixes industry knowledge with the Salesforce technology suite
- Integrates quickly with existing POS and inventory solutions

With Customer.Connect, it's easy to reach shoppers in new ways and to make marketing efforts and sales staff more effective.

BENEFITS

Retailers use Slalom Customer.Connect to accelerate their customer-engagement strategies via:

- **Multi-channel Personalization.** Fuel a more personalized customer journey with targeted recommendations, campaigns and up-/cross-selling opportunities based on purchase history, customer behaviors and preferences. Deliver that content via e-mail, mobile, social or online to keep engagement high.
- **Empowered Employees.** Mobile tools enable store employees to provide better customer service and to collaborate on new services and solutions. The clienteling mobile app creates a personalized and contextual experience for shoppers, freeing employees to assist other customers.
- **Rapid Innovation.** Develop internal capacity to build and test new customer and employee applications faster than ever using this solution, enabling quicker responses to changing market demands and customer preferences.

75% of shoppers want retailers to use personal information to improve the shopping experience.

[Learn more](#)

ABOUT SALESFORCE

Salesforce, the Customer Success Platform and world's #1 CRM, empowers companies to connect with their customers in a whole new way. For more information about Salesforce (NYSE: CRM), visit: www.salesforce.com.