



Maximizing

BUSINESS EFFICIENCY WITH SALESFORCE

Implementation and Beyond



salesforce

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Introduction

Sustaining business success requires powerful customer relationship management. Many firms struggle with fragmented customer data and inefficient workflows, that hinder growth.

Modern platforms lead this transformation with their ability to unify customer data, automate key processes, and provide actionable insights. This empowers businesses to build stronger relationships and drive revenue. By offering customizable solutions tailored to diverse industries and business sizes, these platforms transcend the limitations of traditional CRM, and foster agility and innovation

The Strategic Value of CRM

A well-designed CRM approach enables organizations to cultivate prospects, transform inquiries into sales, and build enduring client relationships. Our firm has witnessed how strategic CRM deployment drives revenue gains, enhances customer experiences, and optimizes operational efficiency across all departments.



Salesforce: Beyond CRM

A Comprehensive Business Ecosystem

Salesforce has earned its position as a premier CRM solution for compelling reasons. Its cloud infrastructure delivers exceptional adaptability, growth potential, and data protection. What truly distinguishes Salesforce is its robust ecosystem that goes well beyond traditional CRM capabilities to include sophisticated marketing tools, commerce solutions, business intelligence, and custom development options.

Salesforce Across Industries

Our expert consultants have successfully delivered Salesforce implementations for organizations spanning multiple sectors:

- Financial institutions utilizing Salesforce to maintain regulatory compliance while strengthening client relationships
- Healthcare providers enhancing patient communication and care coordination
- Manufacturing enterprises unifying their sales pipelines with service operations
- Retail companies crafting seamless customer journeys across digital and physical touchpoints
- HR departments streamlining talent acquisition while creating personalized employee development pathways
- Logistics companies connecting fleet operations with customer delivery expectations in real-time
- Construction firms reducing project delays by integrating contractor management with materials tracking
- Insurance providers automating policy renewals based on individualized risk profiles rather than generic timelines

Understanding the Salesforce Ecosystem

Our firm specializes in the Salesforce ecosystem, focusing on its core products:

- **Sales Cloud:** We optimize sales processes through effective lead management, opportunity tracking, and precise forecasting.
- **Service Cloud:** We enhance customer service delivery with robust case management systems and comprehensive knowledge bases.
- **Marketing Cloud:** We enable personalized customer journeys across diverse channels, including email, mobile, social media, and web platforms.
- **Commerce Cloud:** We build seamless e-commerce experiences designed to drive conversions and enhance online sales.

We tailor these Salesforce solutions to meet the unique needs of each client, ensuring optimal integration and a strong return on investment.



Salesforce Editions

Choosing the Right Fit for Your Business

Selecting the appropriate edition is important for maximizing business impact. We provide guidance to ensure clients choose the solution that aligns with their needs:



Essentials

Helps small businesses that need basic features to streamline their operations.



Professional

Tailored for expanding businesses that necessitate comprehensive CRM functionalities to support growth.



Enterprise

Developed for larger organizations demanding advanced customization and complex workflow automation.



Unlimited

Designed for enterprises requiring the full spectrum of Salesforce capabilities, coupled with premium support and scalability.

Key Benefits

Our implementation approach emphasizes Salesforce's most impactful advantages:

- 360-degree customer view for informed decision-making
- Workflow automation to eliminate repetitive tasks
- Real-time analytics and reporting for data-driven insights
- Mobile accessibility for productivity on the go premium support and scalability.



While Reducing Costs

Salesforce organizes its storage into two categories: Data Storage (e.g., records, contacts, cases) and File Storage (e.g., attachments, documents, chatter files). Each comes with a predefined limit—exceeding which incurs additional costs. Without a structured approach, growing data volumes can lead to slower performance, high storage fees, and a cluttered user experience.

We help businesses optimize their Salesforce storage by combining smart clean-up strategies with long-term archival solutions. This improves platform responsiveness while keeping operational costs in check.



Our optimization practices include:

- **Targeted Data Archiving:** Offload non-critical records (e.g., closed cases, old tasks) to external storage systems or use Salesforce’s Big Objects for cost-effective historical storage.
- **Cleanup of Unused Data:** Identify and remove outdated logs, reports, or duplicate entries using tools like Salesforce Optimizer.
- **File Storage Control:** Implement policies for attachment sizes and recommend external file handling through integrated cloud platforms.
- **Usage Monitoring:** Set up dashboards to track usage trends and avoid unexpected overages.
- **Support for Compliance:** Ensure archived data meets your organization’s retention policies without overloading the system.

This approach not only cuts down storage-related expenses but also ensures users experience faster load times, smoother navigation, and better data clarity—setting the stage for a high-impact implementation.

Salesforce Implementation Process

Our Salesforce implementation methodology has been refined through years of diverse client engagements. Unlike cookie-cutter approaches, we've developed this framework based on real-world challenges and successes across industries.

Phase 1: Planning and Preparation

We begin by aligning your business objectives with Salesforce capabilities, defining key stakeholder roles, and validating specific requirements. This critical foundation prevents the scope creep we've seen derail many implementations.

Phase 2: System Design & Configuration

Here we develop customized system architecture tailored to your unique workflows. We've integrated Salesforce with virtually everything, creating seamless information flows where data once stagnated.

Phase 3: Data Migration

Our team meticulously cleanses and migrates existing data using sophisticated ETL processes. We've rescued numerous projects where poor data migration created costly downstream complications.

Phase 4: Testing and Quality Assurance

Beyond standard QA, we conduct rigorous workflow validation and integration testing using actual business scenarios your team faces. User acceptance testing ensures functionality truly meets your requirements, not just technical specifications.

Phase 5: Deployment and Go-Live

We handle system launch with minimal business disruption, providing hands-on support during the critical initial adoption period when user experience shapes long-term success.

Phase 6: Continuous Improvement

Your Salesforce environment should evolve alongside your business. We establish feedback mechanisms and performance monitoring to continuously enhance the system's efficiency and ROI.

Salesforce Customization

To adapt to your evolving business needs, we offer tailored customization and enhancement services:

- **New Object Creation and Workflow Modifications:** We create custom objects and modify workflows to align with your specific processes.
- **Report and Dashboard Development:** We develop insightful reports and dashboards to provide actionable business intelligence.
- **Process Automation Implementation:** We automate repetitive tasks and processes to improve efficiency and productivity.
- **App Development and Extension:** We build custom applications and extend existing functionalities to meet unique business requirements.
- **Integration with Third-Party Tools:** We seamlessly integrate Salesforce with ERP systems, marketing automation platforms, e-commerce systems, document management solutions, and custom applications.
- **User Training & Upskilling:** We provide ongoing training for new features, role-specific advanced training, admin certification preparation, and custom documentation and knowledge base creation, to ensure your team maximizes Salesforce's potential.



Salesforce Modernization

Building upon the foundation of tailored customization, a strategic consideration for many businesses is Salesforce modernization. This initiative ensures your Salesforce environment remains agile and aligned with evolving market dynamics. Recognizing the moment for modernization is key, and it's particularly relevant when:

- **Operational workflows become outdated:** Leading to inefficiencies and reduced productivity.
- **Integration complexities hinder data flow:** Creating data silos and impeding holistic business insights.

Emerging technologies, like AI, offer significant competitive advantages: But your current setup lacks the capacity to leverage them.

Modernizing your Salesforce platform delivers substantial benefits, including:

- **Enhanced operational efficiency:** Through streamlined workflows and intelligent automation.
- **Improved data accuracy and accessibility:** Via seamless integration with critical business systems.
- **A superior user experience:** Fostering greater adoption and maximizing platform utilization.
- **Data-driven decision-making:** Enabled by advanced analytics and AI-powered insights.

By proactively modernizing your Salesforce environment, you ensure sustained relevance and a competitive edge in the dynamic global market.



Support & Maintenance

Our commitment extends beyond initial implementation, providing comprehensive ongoing support and maintenance services:

- **System Monitoring and Optimization:** We proactively monitor your Salesforce environment to ensure optimal performance and stability.
- **Bug Fixes and Troubleshooting:** Our team provides prompt resolution to any system issues, minimizing disruptions.
- **Regular Health Checks and Performance Reviews:** We conduct periodic assessments to identify and address potential performance bottlenecks.
- **Release Management and Upgrade Assistance:** We manage Salesforce releases and upgrades, ensuring seamless transitions and minimal downtime.

Your Partner in salesforce -Driven Digital Transformation

Committed to your digital transformation, 7T aims to offer unparalleled CRM consulting. We deliver end-to-end Salesforce solutions, from initial implementation and bespoke customization to strategic modernization and ongoing support. We partner with you to understand your unique needs, offering complimentary assessments to drive measurable improvements.

Our expert consulting ensures your Salesforce environment aligns with your evolving business goals, maximizing your investment and operational efficiency.

Driven by our business-first approach, we establish ourselves as a trusted partner in your digital evolution, leveraging our proven methodologies, deep industry knowledge, and commitment to your success.





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Thank You

