

The background of the entire page is a grayscale image of a clock face, with the numbers 1 through 12 visible. The clock is slightly out of focus, creating a sense of depth. A bright green border frames the entire page.

Salesforce Secrets for Time-Starved Sales Teams

Save time harnessing the world's most powerful CRM

Ever wish you had more time?

Deciding to implement Salesforce can be like buying a bakery just to get a loaf bread to make a sandwich. Ham on rye? Check. But what are you going to do with all those croissants?

When you make Salesforce your CRM system, you're firing up a platform with such a comprehensive suite of services that you might not know everything you can "bake" with it. Or you know how much you can do with it, but are so paralyzed by all the options you don't know where to start.

Because you're not a Salesforce expert. And that's okay. (Seriously, your customers need you focused on what your business card says you do.)

You just need a partner—someone who understands the dynamics of sales, saving time, and making things simple...an expert that can dig deep into your operations and streamline and automate Salesforce to do your bidding.

And that's what this ebook is all about. It's a study of real-world challenges and requirements from Salesforce and how fullOpp made them happen.

And while our characters are fictional (privacy and all that, y'know), their stories are real stories, from customers who have walked down this dusty road and found fullOpp to be the cool glass of water at the end of it.

We'll show you how much time you can save when you use Salesforce to its fullest potential. (Of course, we had estimate some things—like the size of your sales team—to calculate the total time suck. However, the time-spent estimates are based on surveys with our customers to give you a range of possibilities.)

Ultimately, you were hired to drive more value to the bottom line—not figure out how to use a dough hook or set up a dashboard. We optimize Salesforce and put time back in your schedule.

What you do with that time? Well, that's up to you.



Excel Hell and the Stairway to Dashboards

You gotta have the right data. Period. Maybe you set up dashboards, but the numbers you're seeing have no real value. What do they mean? Where did they come from? Why doesn't it look right? And so, your sales manager does the only thing he knows will work (kinda)...he falls back on his good old friend Excel to gain the important feedback and insights he needs.

Who it affects	How it affects them	Total time wasted
 <p data-bbox="258 831 423 856">Donna, Sales Rep</p>	<p data-bbox="621 600 995 846">"What the heck is going on with marketing? They've got me wasting time on leads that aren't even qualified. I already have 1-1 meetings with my sales manager to discuss results, which always go over our 15-minute allotment. Not to mention all the ad hoc meetings we have to discuss the unqualified lead issues."</p>	<p data-bbox="1092 606 1442 638">4.5 to 7 hours each week</p> <p data-bbox="1092 653 1414 709">15 to 60 minutes per 1-1 meeting 1-2 times a week</p> <p data-bbox="1092 747 1386 835">30 minutes per meeting about unqualified leads 4-5 times per week</p>
 <p data-bbox="245 1178 440 1203">Ryan, Sales Manager</p>	<p data-bbox="621 926 995 1209">"I spend way too much time in 1-1 meetings with my sales reps. Staying on top of what 10 people are up to is a full time job by itself. I could really use that time to strategize so we meet our sales targets. Once that's all figured out, I still need to combine 10 spreadsheets and roll up all the information to our director. Just thinking about it all exhausts me."</p>	<p data-bbox="1092 957 1463 989">3.5 to 22 hours each week</p> <p data-bbox="1092 1003 1458 1060">15-60 min for 1-1 meetings, 1-2 times per week, with 10 reps</p> <p data-bbox="1092 1098 1468 1186">1-2 hours per week entering data from separate Excel sheets into report for director</p>
 <p data-bbox="209 1524 477 1549">Phil, VP of Sales + Marketing</p>	<p data-bbox="621 1314 984 1535">"I don't understand why I'm still getting reports in Excel when we've invested so much in Salesforce. Isn't it designed to create those reports for us? I know how much time Ryan spends creating these reports for me and we both know it's a waste for him and the company."</p>	<p data-bbox="1092 1314 1463 1346">0 hours wasted each week</p> <p data-bbox="1092 1360 1468 1514">Phil gets what he needs, but deals with unnecessary stress and frustration because he's invested in a system that no one uses the way it was intended to be used</p>
	<p data-bbox="621 1619 989 1902">"fullOpp helped us improve our operational process. By focusing only on critical KPIs, they were able to create dashboards that gave Ryan immediate insight into the performance of his sales team and Phil insight into whether his marketing team was effective so Donna could stop following up on unqualified leads."</p>	<p data-bbox="1157 1629 1414 1661">weekly time savings</p> <p data-bbox="1130 1776 1438 1818">8 to 29 hours</p>



The Customer Service Catch 22

You know happy customers stay longer and spend more, which means customer satisfaction and transparency are extremely important to your organization. So you spend hours each month digging through different sources to provide a summary of the services you provided. Each report and email has to be created and sent out manually. The last week of the month feels like a war zone. And you're still not presenting these reports in a timely way, which frustrates your customers, too. *No bueno!*

Who it affects	How it affects them	Total time wasted
 <p>Donna, Sales Rep</p>	<p>"I own many different responsibilities, but nowhere in my job description does it say that I need to spend four full days a week copy-pasting information from different Excel sheets and systems to create reports (PDFs, if you please!). We have 120 clients and I have to do these one at a time. One. At. A. Time.</p>	<p>30 hours each month 15 minutes per email 120 clients (so 120 emails) ...all crammed into a one-week span</p>
 <p>Ryan, Sales Manager</p>	<p>"I totally understand why Phil goes nuts once a month. He wants to make sure customers are delighted by their experience with us. But I have so many other urgent priorities—making sure my team continues to perform as well as all the calls and emails. And yes, a few of those calls are customers wondering where they stand for the month. It's a real Catch 22."</p>	<p>10 hours each month 10 minutes per status update call 15 status update calls per week</p>
 <p>Phil, VP of Sales + Marketing</p>	<p>"When I signed these customers, I promised them a certain level of service and we're just not delivering. The overhead to send performance reports is just insane. I don't understand why it takes so much time. How difficult can it be?"</p>	<p>0 hours wasted Unless, of course, a client goes over Ryan's head and wants to ask Phil where their reports are and why his team isn't living up to his promises</p>
	<p>"fullOpp standardized an import process for all of our different data sources. They also created recorded training documentation so the team can mass upload custom reports into our CRM easily. With Salesforce and document generation applications, our reports are all created and emailed in one batch to hundreds of clients. Just. One. Batch."</p>	<p>monthly time savings</p> <p>40+ hours per month</p>

The Curious Case of the Click-Happy Critics

If you counted how many clicks it took to generate all the reports your teams need, you'd quickly lose track of the zeros. Yes, there's a large amount of data that needs to be input into your system, and it has to be done...but it shouldn't take nearly this long to do it. *There's got to be a better way!*

Who it affects	How it affects them	Total time wasted
 <p data-bbox="258 831 423 856">Donna, Sales Rep</p>	<p data-bbox="621 600 1000 846">"Click, click, click, click, CLICK! This is truly a witch hunt. It takes 15 looong minutes just to input the data management needs to see into our system. And they wonder why my sales quota is off! With so much data entry happening in so many places, no one on my team has time to do what we were hired to do—sell!"</p>	<p data-bbox="1094 636 1455 667">25 to 125 hours per week</p> <p data-bbox="1094 680 1406 800">15 minutes per opportunity 10 to 50 opportunities per week 10 sales reps on the team (2.5 to 12.5 hours per rep)</p>
 <p data-bbox="245 1178 444 1203">Ryan, Sales Manager</p>	<p data-bbox="621 921 1000 1050">"Our CRM is dysfunctional. Some users enter all of the data, some don't. Donna tells me she simply can't waste time on data entry if she's going to hit her sales targets. I understand, believe me, but there's no consistency in our reporting and we need that.</p> <p data-bbox="621 1073 1000 1213">"So I end up having to revert back to spreadsheets and weekly meetings with each member of my sales team to get a clear picture of where we're at before Phil comes knocking on my door asking why I don't work closer with the marketing department. Seriously, who has the time?"</p>	<p data-bbox="1094 989 1414 1020">6 to 12 hours per week</p> <p data-bbox="1094 1033 1438 1152">30 to 60 minutes per meeting 10 meetings per week (1 per rep, team of 10) 1 to 2 hours managing Excel sheets</p>
 <p data-bbox="245 1530 444 1556">Ryan, Sales Manager</p>	<p data-bbox="621 1293 1000 1539">"We have to keep fine-tuning the sales process so we have a consistent stream of revenue. We don't have the luxury of wasting perfectly good leads, but my incomplete dashboard shows that either sales reps are skipping crucial steps in our processor they're just not logging it. That costs us business. Also, there's absolutely no consistency to what we do and the missing numbers do not support an educated conclusion. Our team spends hours creating processes that aren't being followed. It's a waste!"</p>	<p data-bbox="1094 1356 1414 1388">3 to 24 hours per week</p> <p data-bbox="1094 1400 1455 1493">60 to 90 minutes per meeting 3 to 8 execs / managers participating 1 to 2 times per week</p>
	<p data-bbox="621 1640 1000 1892">"fullOpp's ability to 'close the loop' impressed us all. The visual workflows they implemented turned our complex ordering system into a single page ordeal. Sales reps spend 10% of the time they used to, which has not only increased our productivity, but has opened doors for our sales rep to nurture opportunities that were previously falling through the cracks. We were shocked when we realized how much business we were actually leaving on the table because we couldn't see beyond what was directly in front of us."</p>	<p data-bbox="1159 1635 1411 1667">weekly time savings</p> <p data-bbox="1094 1787 1459 1835">34 to 161 hours</p>



Save time with Salesforce

Just three Salesforce optimizations. 208 extra hours a month—minimum.

And that's just scratching the surface of what fullOpp can do with Salesforce. From system implementation, marketing automation, and data management to onsite or remote training to metrics and analytics administration, we'll help you harness the power of the world's most powerful CRM...and save time doing it.

We like to imagine Phil, Ryan, and Donna spending all that extra time improving their messaging, closing more sales, and innovating new products. But maybe they're finally just clocking out on time and enjoying life a bit more.

Only you can put the value on what more time means for your organization. We're just the ones who can help you find it.

[Let's talk about how we can optimize Salesforce and put more time back in your calendar!](#)



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Florida-based Salesforce CRM Consultants
certified to implement and administer
customer relationship management solutions.