

Deriving Account Rating and Visibility in Salesforce

HIGHLIGHTS

- Consilio selects Decisions on Demand platform for constructing their account rating system to help manage sales opportunities and gain visibility into the health of client accounts
- Account rating system takes into account- and contact-level history/activities/tasks, opportunities, and company-defined weighting factors to calculate account health
- Decisions on Demand platform allows for customization of the rating system without the need for technical resources
- Consilio uses dashboards and alerts from standard and custom Salesforce.com objects to increase accountability from the sales team, focus the sales reps on relationship building, and provide unbiased account information to executive management

Background

Consilio is a legal services and technology company with offices on multiple continents and a global sales team. The company uses Salesforce to manage sales opportunities and also to gain visibility into the health of client accounts. With most of Consilio's customers located in multiple business centers around the globe, there are typically multiple account managers associated with one global account. Paramount to Consilio's success is the ability to understand the quality of existing relationships within those accounts, and better leverage those relationships to fuel sales efforts.



Prior to engaging Decisions on Demand, Consilio was unable to synthesize the contact activity data being input into Salesforce, and was therefore reliant upon the subjective opinions and best guesses of the sales reps to provide visibility into account health. Unfortunately, this subjective method garnered uncertain, inaccurate and questionable insights, making it difficult for executive management to structure effective sales territory plans or to forecast future revenue. To that end, Consilio devised an account health ranking system based on Salesforce activity to drive account territory plans, improve sales collaboration across regions, enable better sales rep management, and ultimately provide long term forecasting support not reliant solely on "lower funnel" pipeline reports.

Prior to engaging Decisions on Demand, Consilio's approach to calculated health ranking was to run dozens of reports in Salesforce, export data into a complex spreadsheet, perform the necessary calculations using vlookups, nested logic and cross-referencing, and then generate an MS Excel report that was distributed weekly to the sales team and sales management via email. Although the spreadsheet reports provided Consilio with information they needed, it was not "real time" since the data was only as good as the last weekly export and analysis. And, running and distributing the analysis outside of Salesforce was countertrend to centralizing sales rep activity within Salesforce. The company needed all of this logic automated and run within Salesforce to eliminate the manual effort, as well as facilitate better utilization by the sales team and engagement with executive management.

According to Pete Feinberg, Vice President of Products and Marketing at Consilio, *"The lifeblood of our company is building and maintaining healthy relationships with each local office of our global client base. Allowing executive management and our sales reps to have fact-based conversations about the health of those relationships based on activity data within Salesforce is therefore core to our business success."*

Approach

Consilio's Salesforce admins were a combination of marketing generalists and back office staff. These resources did not possess the Salesforce expertise to create the custom configuration and scripting routines required to generate the necessary contact record ratings or account record ratings essential to the desired solution. To fill this gap, the company looked at various Salesforce consultants to build this custom scripting functionality for them. However, the result from that approach was something that could not be easily maintained and configured by Consilio over time. As a growing and evolving company, Consilio needed a solution that could be flexibly administered by the Consilio internal resources so the scripts and logic could mature as the sales management methodologies matured. After performing a search on the Salesforce AppExchange, Consilio came upon the business rules platform from Decisions on Demand. After discussions, a demo, and a proof of concept, Consilio determined that Decisions on Demand could provide the capabilities, self-service enablement, and domain expertise required to solve the business challenge.

Solution

Working with the Decisions on Demand team and their business rules management system (BRMS), Consilio created a set of business rules that automatically computed contact-level relationship health rankings, as well as account-level health rankings equivalent to the prior, spreadsheet-based rules logic. Those business rules would take into account history, tasks, activities, and opportunities data within Salesforce. Using the Decisions on Demand platform, which is accessed via Salesforce, Consilio would now be able to create, change, and delete business rules on the fly to accommodate their evolving business model – future-proofing the investment. The power of the platform comes from the fact that Consilio could utilize multiple account factors – number of activities, number of contacts, recent activity, opportunity size, opportunity type, win or loss data, etc. – and could easily attribute a weighting for each to perfect the health ratings used by sales and executive management to determine the best client engagement tactics. The company could then generate triggers and flags on accounts to proactively drive sales behavior, as well as show account/contact engagements that could not be done previously.

Results

Consilio's sales management is now able to get an accurate representation of account health directly from Salesforce data within Salesforce itself. Now that the contact and account ratings are automated within Salesforce, there is no more ambiguity between sales reps and executive management, and is no longer subject to interpretation. Consilio is now exposing the health ratings developed from Decisions on Demand business rule logic output via Salesforce dashboards that enable informed conversations between sales reps and executive management on a weekly, even daily basis. These Salesforce dashboards are directly informing sales reps about the activities they should be taking in real time, based on contact relationship and overall account health. Consilio envisions that these dashboards will continue to focus sales on building stronger relationships with the right contacts, which will drive new business opportunities, as well as provide better downstream pipeline visibility for finance and executive management. The account ranking scheme also ensures that everyone in the company is using a common vernacular when discussing the health of accounts.

"Decisions on Demand is amazing to work with. I would highly recommend [them] to others who have complex business logic they want to run inside Salesforce."

Pete Feinberg, Vice President, Products and Marketing, Consilio