

7 Reasons to Run Your Service Business Natively on Salesforce



Projects with billable hours require careful orchestration between what resources are available and what projects are being produced for customers. As a company grows, so does the need to balance input and output. Professional services automation can give an organization a huge leap forward as it seeks to get more done—at higher profits—with the available resources. The goal is to sell and deliver services in a way that turns new buyers into loyal customers for life.

In today's services world, project teams are under increasing revenue pressure and have to manage high demands from customers who have increasing expectations for fast project turn-around time and successful delivery. However, many projects fail because of things like poorly scoped projects, misaligned expectations between the company and the client, lack of transparency and communication with the client, and delays due to poor resource planning.

Many of these problems can arise when a company has the sales team working from Salesforce while the services team uses a separate project management system. This is because the two teams can't see what the other is doing. Nor can they easily review notes during the handoff after a customer makes a purchase. This can be a setback to any company striving to create an exceptional experience that starts with the salesperson and flows seamlessly through service delivery.

We at Klient Software have identified seven ways an organization could benefit from narrowing the gap between sales and services teams, by using PSA software built natively within Salesforce, rather than separate systems.





1. Visibility for Everyone

Customers are prospects first, and the transition from one to the next can be rough for customers and personnel alike. This is especially true if front-end teams can't easily communicate with service and fulfillment specialists.

Sales needs to fully understand what they're selling to ensure expectations are aligned and prospects aren't set up to become instantly dissatisfied customers. Likewise, services teams need to be able to pick up where Sales leaves off with no disruption in customer experience.

When prospect information is housed in a database that various internal departments can access, less communication needs to occur to keep the onboarding process moving as those prospects become customers. Having **greater employee access** to detailed customer information in a CRM will make both Sales and Service responsibilities that much easier to complete. That in turn will ensure the customer's service delivery experience is **faster and smoother** than it would be without whole-organization visibility.





2. Mobile Access

Another benefit to using a PSA system built natively within Salesforce is having mobile access to the platform and the information it contains.

Because Klient's professional services automation exists natively within Salesforce, any information related to accounting, document management, project management, resource management, or any other PSA data can be pulled up on the **smartphone or tablet** of the user's choice.

This gives sales reps, service and product teams, and leadership **easy access to the information**, as well as a more convenient way to enter information. Prospect profiles that are easier to fill out become customer profiles which are more complete. This can **increase onboarding times** by reducing the amount of extraneous communication between front-end and back-end teams, speeding up the process as customers eagerly await to receive the product or service they've been sold.





3. Planning & Forecasting

When information is added to a centralized system, leadership and operations teams can strategize and forecast with **greater clarity** than ever before.

Instead of needing reports or data from individual departments every time a planning session occurs, the **information is easily accessible** from one software system. This cuts down on the time it takes to organize results, strategize for improvement, and implement changes so the company can grow faster and provide even better services.

Because Klient's PSA software handles services proposals, resource planning, revenue forecasting, and billing (among many other functions), **organizations can plan more strategically** within each area or for the organization as a whole.

Service organizations can plan and forecast project and resources needs in the sales pipeline, before a deal has closed.

Faster, more accurate sales and service planning can lead to improved services, successful project outcomes, and greater customer care. Current customers will be happier, and new customers will be ready to recommend your business to others.





4. Accountability

Regular auditing of departmental results can improve everyday operations by showing leadership what is and is not working, giving an organization greater agility as it grows and adapts to its market.

When a PSA system runs within Salesforce, any data collected there becomes easier to monitor and extract. This gives the teams responsible for auditing the business a better, faster way to assess the state of each department and subsequently, the entire organization.

Additionally, because triggers can be set up within the system, it can be used to ensure approval processes are adhered to across the entire company. This can **speed up delivery and production**, ensuring customers see the fastest turnaround times possible.





5. Configuration

Salesforce is the world's number one CRM for many reasons, but one of those is its configurability.

Using a PSA that's native to Salesforce combines the automation of accounting, invoicing, project management, proposals, and resource management with the customizable setup of Salesforce. Instead of using disparate systems and applications, an organization can use **one powerful system** in order to create labels, forms, and workflows that work best for the business.

When the system can be set up to gather the information an organization needs most, the PSA system is that much better at making business happen. When a business works better overall, customers experience greater satisfaction.





6. Data Security

With Salesforce comes the ability to restrict access to objects, fields, and records, so only the people in an organization who need to see sensitive information have access to it.

To review how a CRM is set up regarding these security features, an administrator can run a quick Health Check in Salesforce to **increase security with one click**. The resulting score can expose and fix potential vulnerabilities within the security settings.

For customers concerned about the ever-evolving world of data security, the **additional protection** of using a PSA system within the security of Salesforce is reassuring.





7. Client Satisfaction

All of the above features add up to one thing: increased client satisfaction.

The nature of services is changing from a one-time project focus to a focus on repeat business and long-term customer relationships. As a result, PSA needs to become more customer-focused and less project-focused. This is achieved by designing PSA software with customers at the center, and providing a way for services teams to work hand-in-hand with the customer throughout the service delivery process. A PSA built on Salesforce can often accomplish this better than other PSA systems can.

When a prospect converts to a customer, they're excited about the company's product or service, but maintaining that excitement throughout the entire customer lifecycle can be difficult to impossible. When it comes to keeping momentum, many organizations know what the power of a capable, customizable CRM can do for their business and their customers. Many of those organizations also recognize the benefits of having a PSA system to run both project management and resource management.

Combining CRM and PSA into one easy-to-use, mobile-accessible platform gives an organization even greater control, visibility, and output. Having visibility across internal teams, more robust reporting and planning capabilities, and enhanced information security features will ensure jobs are completed faster, products are delivered with the highest quality, and **clients are more satisfied than ever.**



About Klient Software

Klient Software is a **customer-centric PSA built 100% natively on Salesforce** and designed to support **long-term client relationships**. Klient helps companies transform service delivery and client success with our next-generation Project & Professional Services Automation (PSA) solution.

Built 100% native on the industry's leading cloud platform from Salesforce, Klient provides **a single application to manage the performance and profitability of every project** delivering a 10x faster deployment when compared to traditional solutions.

To learn how Klient can help your service business grow, contact us directly at **1-844-438-5769** or by email at **contact@klient.com**

