



FORSYS FOR SALESFORCE CRM

Streamline Mission-Critical Processes,
Automate Manual Workflows, Eliminate
Redundant Tasks, & Increase Productivity

OVERVIEW

Forsys is a trusted leader in designing, developing, implementing, and delivering transformational experiences with Salesforce CRM technology. As a [global ISV and consulting partner for Salesforce](#) and an [authorized Salesforce Cloud Reseller in India](#), our end-to-end Salesforce CRM services meet the growing needs of companies of all sizes, at every stage of growth, across industries.

Our global team in Sales, Marketing, and Service Cloud boasts 175+ certifications and 120+ certified navigators with experience executing more than 200 Salesforce engagements across multiple industries. Having implemented Salesforce CRM for the world's most trusted organizations, our solutioning enables businesses to:



Clarify the data clutter, and proactively track and manage customer data.



Connect teams across anytime, anywhere.



Intelligently capture customer emails.



Automate the manual and routine tasks.



Deliver dashboard-based analytics for real-time insights and decisions.

IMPLEMENTATION METHODOLOGY



Define, Plan,
& Prepare



Set Up &
Customize



Schedule
Phased Rollout



Drive
Adoption



Measure,
Monitor, & Track





Define, Plan, & Prepare

This step includes identifying an executive sponsor, team structure/resource planning, defining the success criteria, finalizing the project methodology (waterfall or scrum), and designing the implementation roadmap.

Set Up & Prioritize

Once the requirements are defined, initiate data scrutiny for setting up and customizing Salesforce CRM. It can be approached by defining the security settings, creating custom fields, page layouts, custom objects, custom tabs, rules, reports, etc.

Schedule Phased Rollout

After the implementation architecture has been designed, prepare for 'go live' by moving your entire configuration to a full sandbox environment to review performance under large data volumes supported by a detailed change management process.

Drive Adoption

In this step, gauge adoption by setting up usage reports and adoption dashboards to improve its usage over time.

Measure, Monitor, & Track

Keeping a close watch on the system's performance and effectiveness by measuring, monitoring, and tracking will help close the loop and make necessary adjustments even after the implementation is complete.

OUTCOMES FROM FORSYS' SALESFORCE CRM CUSTOMERS

37%

more
sales
revenue

30%

jump in
sales
productivity

26%

increase in
qualified
leads

35%

improvement
in
forecasting

45%

higher
customer
satisfaction

43%

better
marketing
ROI

Source: Statistics captured from multiple Forsys client case studies

[Explore our resources library](#) to dive into how Forsys' deep industry specific solutions and accelerators, backed by Salesforce technology, enable our clients to become future-ready. Access case studies, whitepapers, ebooks, data sheets, blogs, and much more.

[Get in touch](#) with our experts to get your questions answered about the Forsys and Salesforce alliance, joint solutions, implementation, or anything else.



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