Console Design

Empower your sales reps to sell smarter and faster.

Do your sales reps struggle to navigate through a sea of information on a multitude of pages? Help them work smarter. With the Sales Cloud Console Design Accelerator, a Specialist will work with you to develop a consolidated interface that gives your sales teams the ability to work with fewer clicks, less scrolling and less switching between pages.

What it can do for you.

- Increase sales rep productivity by giving them access to all customer information in a single view

- Allow reps to easily spot important fields on records

- Provide swift access to sales intelligence

How It Works

A Certified Specialist will guide you through the process via three calls totaling 4 hours over 2 to 4 weeks.

Discovery

- Review your current sales process

- Provide Console overview and design options

- Develop quantifiable success criteria for use case identified

Analysis

- Configure Console for identified use case using latest declarative features

Outcomes

- Console designed and configured in sandbox instance

- Best practice recommendations for designing Sales Console

ADDITIONAL INFORMATION

Premier or Signature

Time you will spend on this Accelerator: 4 hours.

GOAL

Increase revenue

INTENDED USER

Sales leadership teams looking to improve sales rep productivity and need help creating and configuring their Salesforce Console.

PREREQUISITES

- Must have Premier or Signature Success Plan.

- Sales Cloud licenses purchased and users assigned

- Admin access to Salesforce Sandbox

- Service cloud licenses or must have sales console add on licenses

- Sales reps are actively using opportunities and associated activities matched to their sales process

- A sales leader who is engaged and committed to the outcome

To schedule your 1-on-1 Accelerator, visit our Help Portal, or contact your account executive or success team today!

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salesforce success cloud