



The Small and Medium Business Efficiency Toolkit

9 Australia and New Zealand businesses reveal how to capitalise on a new economy



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Adrian Towsey

Area Vice President, Growth Business,
Salesforce

The pandemic was the digital accelerant of the century. Now that the low interest rates and government initiatives are behind us, businesses face new challenges in the form of climbing interest rates, inflation and economic uncertainty.

As a result, we're seeing business behaviour split into two camps:

1. "Seize the day." These businesses see opportunity and are looking to disrupt industries and business models, with technology as their main tool for executing on their vision.

2. "Batten down the hatches." Concerned about stormy waters ahead, these businesses are becoming more risk-averse and slowing investment. They're looking to technology and automation to improve efficiency and reduce costs.

Neither approach is right or wrong, but there are a few common threads between the approaches – there's more scrutiny around ROI and some leaders are finding it easier to fund shorter, smaller projects. >>

2. Introductions

Australia

New Zealand



In other words, managing your business requires better visibility and more process efficiency than before. And the last few years have proved that small and medium businesses (SMBs) need to invest in more than one-off tech solutions – they need automation and access to data that spans all the functions of an organisation. They need the new fundamentals of an efficient business.

This ebook will explain those fundamentals. It will bring them to life through the stories of local SMB leaders who've automated costly inefficiencies and used data to evolve their businesses during uncertain times. And it will show how your business can do the same.





Ben Sheehan

Regional Sales Director, NZ Scale Business,
Salesforce

Here in New Zealand, we tend to be “people” people with a number eight wire mentality. Even in business, our first instincts often revolve around adding new team members and finding quick fixes to keep operations ticking along.

In a tight labour market and uncertainty, however, these mindsets might need to shift from bigger headcounts and fast fixes to new efficiencies and long-term strategies. Of course, one of the biggest time-savers is tech.

SMB’s should be looking for technology vendors that not only help them evolve over the next six months, but the following five and ten years. Additionally, focusing on the fundamentals of business efficiency can help Kiwis channel their people-centeredness and resourcefulness in ways that build long-term business advantages – regardless of the economic climate.

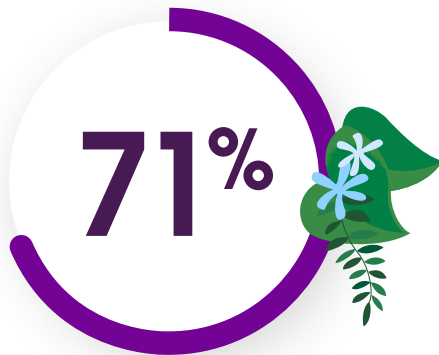
In this ebook you’ll find inspiring real-world examples of other SMB leaders doing exactly that. You’ll also get practical tips and tools to help you forge your own path and turn uncertainty into opportunity.



2

The fundamentals of a more efficient business





of growing SMBs say their business survived the pandemic because of **digitisation**

2021 SMB Trends Report



accelerated profitability was achieved during the global financial crisis by **digitising critical processes to improve efficiency** and gain a competitive advantage

Bain & Company



2. The fundamentals of a more efficient business

Automation

Productivity

Speed

- Automate and integrate to streamline workflows, communication, data updates and collaboration.
- Reduce risks of human error and free your teams from the admin that often keeps them from focusing on higher-value work.
- Save costs by reducing double-up between departments.

Example: Help your sales teams work smarter by supercharging your customer relationship management (CRM) platform with automated functions for faster lead scoring and prioritisation. Capture customer interactions across multiple platforms in real time and turn data into actionable insights.



of high performing businesses use automation to log sales data and customer notes*

State of Sales



Rather than buying a system for each department, it's critical to look at automation across your whole journey. The whole organisation should be one department connected around the customer.

Adrian Towsey, Area Vice President, Growth Business, Salesforce

2. The fundamentals of a more efficient business

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- More customers are online and looking at a variety of digital channels. Help employees engage them when and where customers want engagement, and drive loyalty in a competitive market.
- Make short work of siloed customer data and fragmented systems with an integrated CRM. Rather than teams working with incomplete information about your customers, equip them with a comprehensive, unified view of the customer and enable real time tracking of ROI.
- Pair the cost savings of automation with the ROI of higher productivity and better results.

Example: Digitise as much admin as possible, empowering greater productivity. In particular, this includes processes like scheduling or data entry. The less paperwork and admin your employees need to physically handle, the more time they can spend on what they do best.



2. The fundamentals of a more efficient business

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57%

of customers prefer
to engage via
digital channels

2022 State of Connected Customer

Improving your customer
retention by just 5% can
increase profits by



25-95%

Davidson Consulting



“ Leveraging technology will not only improve your customer experience, it will be your biggest driver of time savings. Think about the blue-sky future state, and take a piece-by-piece approach to eliminating those time sinks.

Ben Sheehan, Regional Sales Director,
NZ Scale Business, Salesforce



2. The fundamentals of a more efficient business

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Information is power. By focusing on a digital backbone that improves visibility and arms decision-makers with the right data at the right time, your business can:

- Build the agility to make dynamic, data-informed decisions and seize competitive opportunities
- Adapt quickly to shifting market conditions
- Reduce costs and maximise ROI faster
- Simplify processes to help teams work more efficiently and productively
- Improve the customer experience and drive loyalty



From consumers to governments, there's a major focus in building a more sustainable world. Is there an opportunity to evolve your products or services to better fit that world? Even if there's not, what role will your business be playing in the next five years?

Adrian Towsey,
Area Vice President,
Growth Business, Salesforce



3

How 9 local Trailblazers built more efficient businesses



3. How 9 local Trailblazers built more efficient businesses



Keegan Bakker
Audata



Marie-Claire Andrews
PaySauce



Adam Bouris
who is elijah



Nolan Leo
360MMS



Shardae Mazzeo
CreativeCubes.co



Marc Havercroft
Go1



Liz Svensk
Adept Engineering



Paris Cockinos
Sphere Drones



Louise Hunter
First AML

3. How 9 local Trailblazers built more efficient businesses

Automation

Productivity

Speed



Keegan Bakker

Founder and CEO, Audata

Audata's suite of Heroku-built apps empowers media organisations with digitised promotions management and data capabilities that make employees' (and audiences) lives easier.

So it's not surprising that the Melbourne-based startup leverages its own forms of automation to work more efficiently.

Its founder and CEO, Keegan Bakker, says they've created automated onboarding journeys for users, including automated

emails with tips and information tailored to relevant products – a huge efficiency gain compared to when Bakker handled all support calls himself!

They also use bots and [Salesforce Knowledge](#) to **automatically answer** at least **45% of customer enquiries**, while [Salesforce Voice](#) automates activities like call transcription for service reps.



A big thing for me is automating wherever possible rather than adding headcount, and Salesforce continues to help make that possible.

3. How 9 local Trailblazers built more efficient businesses

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Marie-Claire Andrews

Head of Marketing & Sales,
PaySauce

“There are only so many humans to go around.” That’s how PaySauce’s Head of Marketing and Sales, Marie-Claire Andrews, describes the core problem that automation is helping their small team manage.

The Wellington-based business has automated a monthly newsletter that used to be collated through spreadsheets. With automated journeys and segmentation, the business can now see what their readers actually want and **open rates have increased from 37% to 52%.**

Andrews also says they’ve automated post-event sales follow-up, allowing sales reps to focus on simply making connections. In the service space, they introduced a [knowledge base](#) to help customers self-serve and reduce enquiries. It came with an unexpected bonus – PaySauce employees have started using it too, automating and streamlining significant portions of their onboarding process.

“**(Automating the data management) liberates us to go and do the human things: to be creative and connected and warm and real.**”



Automation

Productivity

Speed



who is elijah

Adam Bouris

Head of Growth, **who is elijah**

Founded by Rachel Bouris in a two-bedroom apartment, this independent fragrance house saw its **revenue jump from \$120,000 AUD per month to nearly half a million per month** – in only a year.

That sort of growth can come with challenges. Luckily, Adam Bouris, Head of Growth, says automating critical operations gave them capacity to preserve large portions of their wholesale business, which accounts for almost 60% of revenue.

Using Salesforce to manage multiple operations from a single platform, **who is elijah** automated processes in ordering, invoicing and more. This helped them go from **50 to 350 wholesale accounts** – even at a time when they didn't have an account manager or active attempts to bring in new stockists. Along with enabling faster, more informed decisions, the automation and data visibility also helps reduce warehousing errors, resulting in an estimated **savings of \$6,000 per month**.



(Salesforce) drives our workflow and allows us to see all our customers, orders, inventory, influencers and suppliers in one place. It was an investment for us as a small business, but it's now saving us almost three times what we put into it.



3. How 9 local Trailblazers built more efficient businesses

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Nolan Leo

Chief Operating Officer,
360 MMS

Australian non-bank lender 360 Mortgage Management Services (360 MMS) offers a range of solutions to mortgage brokers, referral partners and direct clients. Many of the organisation's clients were unable to obtain financing through traditional bank routes during the height of the pandemic. Co-founders Jason Kuan and Nolan Leo knew they'd need to be able to provide these clients with high-quality service.

They chose Salesforce to ensure the business could service

customers from a single platform and to automate workflows around service-level agreements (SLAs). This helped reduce the manual work – and risks of human error – associated with SLAs. By being able to provide the right service at the right time, **opportunities have increased 700%** from June 2021.

Likewise, its **headcount has jumped from five to 30 in only a year and a half**, proving the value of automation-enabled efficiencies that help deliver above and beyond client expectations.



We couldn't have done this with any other CRM. Salesforce helps us grow at an exponential rate and provide clients and partners the VIP service they deserve.



Automation

Productivity

Speed



CreativeCubes.Co

Shardae Mazzeo

Chief Of Staff, **CreativeCubes.co**

Shardae Mazzeo, Chief of Staff at CreativeCubes.co, likens the Melbourne startup's focus on experience and service to several iconic Las Vegas hotels. While CreativeCubes.co has a very different purpose and mission, it shares a similar commitment to building relationships through excellent customer service and experiences.

To do this, CreativeCubes.co needs to truly know their customers and personalise their service. There's no room for inefficient processes. A CRM

helps the business unite different pieces of data to understand their members across the entire customer journey, contributing to a **70% conversion rate** for prospects who visit its site within two months.

Mazzeo says they also use their CRM to get results elsewhere. For instance, Salesforce [Service Cloud](#) helps them manage support tickets and achieve the productivity of a much larger team.



We're consistently evolving and setting reminders in Salesforce. Even though each day is so different, we're able to stay on top of member requests and offer personal service.

3. How 9 local Trailblazers built more efficient businesses

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Marc Havercroft

President, Go1

Go1 curates professional development courses from one easy online platform. Though it's based in Brisbane, the business has offices in six countries. That's why Go1 uses Salesforce solutions to boost productivity, regardless of where team members are located.

For instance, its sales team manages all opportunities through Sales Cloud, **reducing reporting time by more than 50%**.

Meanwhile, [Salesforce's Pardot](#) enables teams in different countries to set up local

campaign landing pages and nurture journeys in less than 24 hours. Pardot also helps Go1 track attendance at webinars and send targeted follow-up materials.

The business also uses [Slack](#) to cut down on task switching – functioning as its central communication tool, it has a total of 47 integrations that help speed up workflows.



The more we can centralise and streamline workflows, the more our teams can accomplish across some very different markets.



Automation

Productivity

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Liz Svensk

CEO, Adept Engineering

After nearly forty years of operations, family-run Adept Engineering is full of seasoned pros who ensure that clients' pressure equipment is compliant and safe.

Their inspectors' work could always guarantee accuracy and safety. But CEO Liz Svensk knew that a reliance on paper and manual processes were keeping them from serving as many clients as possible, as quickly as possible.

For instance, inspectors often had to ferry paperwork from

one site to another. Meanwhile, service reps frequently needed to decipher handwritten information.

[Salesforce Field Service](#) has helped them digitise the inspection process, allowing inspectors to focus on the work rather than manual admin or scheduling. This includes streamlined data input and image recognition. The result? Adept Engineering has been able to service **more than 620 new sites** without hiring additional administrators.



We're no longer having to sift through piles (of paper) to figure out what's going on. A simple thing that, because of the scale of the work we're doing, is quite significant.



Automation

Productivity

Speed



 sphere drones

Paris Cockinos

Managing Director,
Sphere Drones

This Sydney-based, family-owned business has been around since the 1950's. But it takes timely, informed decision-making to keep up with a fast-paced market 70 years later.

Using data from their Salesforce CRM, the business has a unified view of each lead and customer. This data doesn't just help them service and market to customers, though – it's helped their Managing Director, Paris Cockinos, drive the business in new directions.

Cockinos knew that the drone industry was evolving. Armed with insights from customers, the business was able to more confidently expand into Curo, a proprietary robotics program management platform that integrates Sphere Drones' end-to-end services. This includes a centralised platform for managing robotics programs and operations, as well as workflows and integrations to ensure easier compliance with local regulations.



We have done a lot of strategy work to better understand our customers and opportunities for growth. What I do know is that Salesforce will help us to scale whatever comes next.

3. How 9 local Trailblazers built more efficient businesses

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 First AML

Louise Hunter

VP of Marketing, **First AML**

Based in Auckland, First AML streamlines the entire anti-money laundering onboarding and compliance process, making an otherwise complex and manual process simple for clients and cost-effective for businesses. But to support global growth, they needed to simplify and streamline a few processes of their own.

Since First AML's adoption of Salesforce, the business has been on a continuous improvement journey to streamline key processes and save time. For instance, in finance,

customisation of the contract object and automation rules allowed them to build a robust and reliable billing engine, reducing the time to bill and error rates.

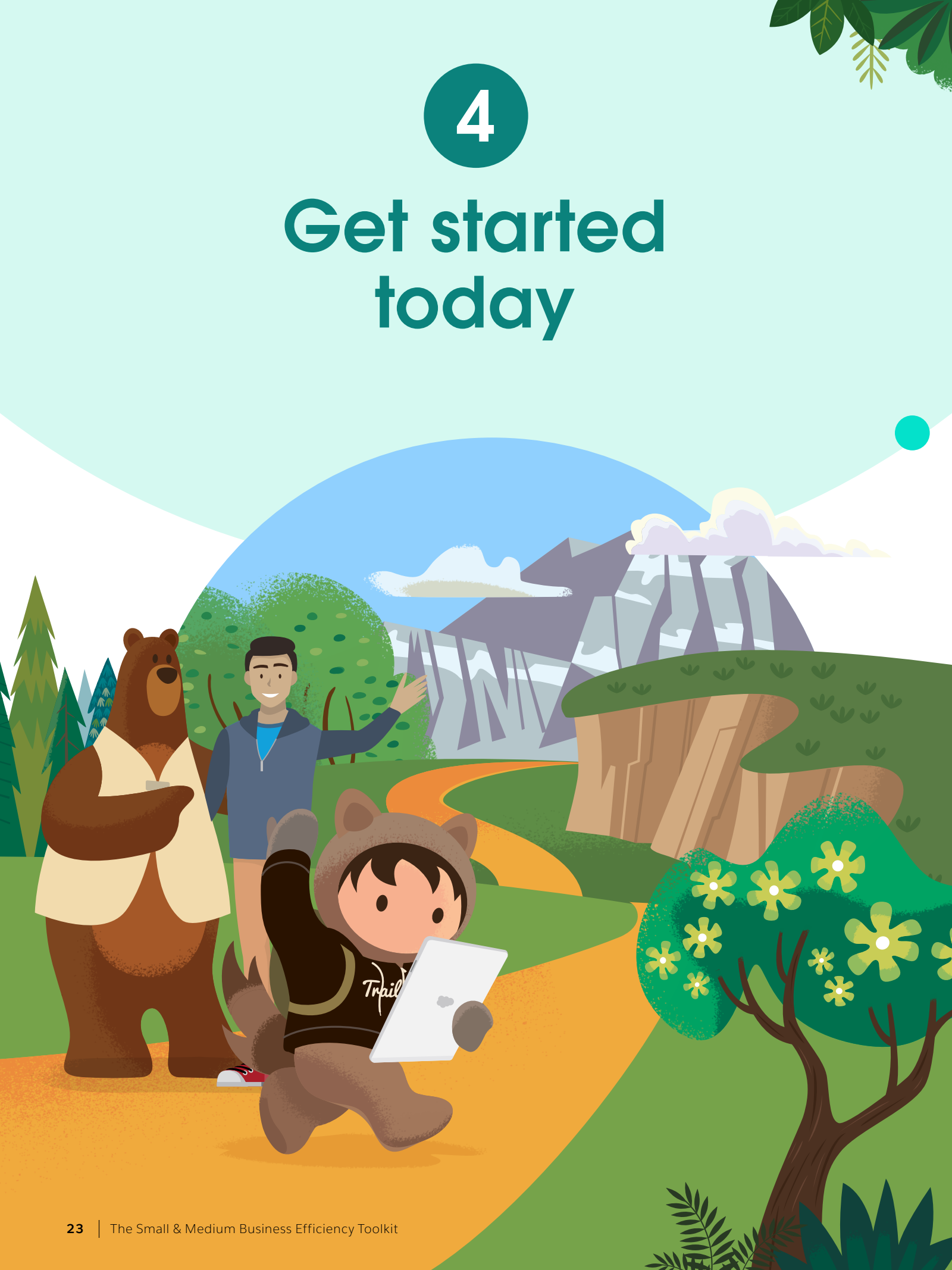
Meanwhile, in sales and marketing, Louise Hunter, First AML's Vice President of Marketing, says opportunity changes within Salesforce allowed for more accurate forecasting and greater autonomy for sales people to close deals within acceptable parameters.



Salesforce customisations have provided freedom to work without boundaries. From screen flows that ensure the right data is captured at the right time, to automations running in the background, it all combines to make doing business a whole lot easier.

4

Get started today





“It’s good to start small, but you do have to take the time to evaluate, ‘Is this something I can work with in the long term?’ Solve short-term problems but keep one eye on long-term strategy.”

Ben Sheehan, Regional Sales Director,
NZ Scale Business, Salesforce



No matter your business circumstances or goals, now isn’t the time to stand still. We’ve got the resources to get you moving.

Tech roadmap

Put technology where it belongs – at the centre of your business.

[Roadmap](#)

Business case template

Evaluate your CRM options and get buy-in from stakeholders.

[Template](#)



Want to speak with a specialist?

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