



Optimize your Salesforce investment and improve collaboration efficiency

## SharePoint & Salesforce integration services



# The cost of searching for documents



**23 mins**

on average searching for the right information.



**20-40 %**

of time wasted by employees searching for documents.

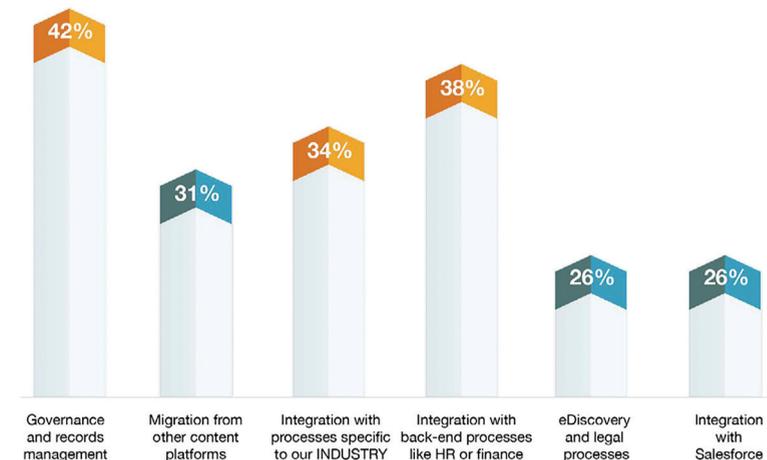


One size fits all is a thing of the past. Modern consumers desire tailored software that solves a specific problem. Salesforce delivers a 360-degree view of the customer across sales, service, marketing, and many more by bringing all your customer data into a unified view.

SharePoint is a web-based collaborative platform; however, its core proposition is a document management and storage system. With Proventeq's integration services, you can use both platforms for what they're best at doing rather than making one platform work alone.

## Key 3rd party roles - governance and LOB process integration

In which areas do you find the use of third-party add-ons most useful?



*AllIM, Mastering Your Microsoft 365 and SharePoint Investment: Moving from Rapid Adoption to Sensible Maturity, 2020*

According to AllIM, transactional content processes are likely driving the 38% that seek additional third-party solutions to help integrate M365 into core line of business processes and the 34% that seek the same for industry-specific processes.



salesforce



## The problem we solve

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You may have utilized Salesforce, the top CRM software in the world. But how can you be certain that you are giving the customer the accurate and most recent information?

Huge volumes of data from your business are dispersed across numerous systems and silos. How do you protect this data against duplication, unauthorized sharing with third parties, and cyber-attacks?

## Proventeq's integration

### Seamless central hub

Proventeq helps you deploy SharePoint as a central hub for all business-critical information and a single source of truth for all documents. We help you seamlessly integrate SharePoint with Salesforce so that the user can still access documents (held in SharePoint) from the Salesforce Platform.

### Efficient cost, user-friendly & smooth experience

Proventeq, with its integration expertise, helps you leverage the best of both Salesforce and SharePoint while giving the users a smooth experience across the two. Integration between Salesforce and SharePoint brings Salesforce license cost efficiency and increased data storage capacity at a moderate cost base. We work with customers to explore the most cost-effective and user-friendly solution, providing the optimum business outcome.



# Case examples using Proventeq's integration

## Cross-functional collaboration

Relationships with customers often start during the prospecting and sales phase. During that period, businesses acquire extensive customer knowledge that is stored in documents, emails, and notes. Other functions of the organization, such as solution specialists, professional services and legal, often get involved to produce compelling proposals to win the prospect's business. They do not necessarily have or even want access to Salesforce.

Once a prospect converts to a client, services and products are delivered together with much further content, documents, and emails to be produced - often managed in SharePoint and Microsoft 365. This content should be controlled in a single location rather than in several data silos from the user's standpoint as well as from the perspectives of data governance and security.

By integrating Salesforce, it is possible to maintain all documents in SharePoint for the duration of the customer's lifecycle. This makes it possible to have a 360-degree perspective of content that is relevant to customers, to have cohesive governance and protection, and to have a shared space for cross-functional cooperation.



# Case examples using Proventeq's integration

## Legacy case management

Case management is a typical use case that benefits from the symbiosis of a system of customer engagement - Salesforce, with a system of content collaboration and records SharePoint.

Proventeq helps you build the best-case management solution by integrating Salesforce and SharePoint capabilities. By integrating Salesforce with SharePoint, cases can be shared within and across the organization with all those involved in case resolution ensuring effective collaboration. Documents will be automatically stored and shared in SharePoint.

At the same time, Salesforce users can still access all the documents from within Salesforce, so there will not be any change in the user experience due to the unified UI. Removing the platform boundaries leads to faster document flow, faster processing, accurate and timely information availability - all the must-have features of case management solutions.

# Integration consideration

## Storage cost savings achieved with integration



SharePoint offers a data storage limit of 1TB per organization plus 0.5GB per user license (versus 11GB per organization and 632MB per user Salesforce license).



Additional storage cost in SharePoint is \$0.20 per GB per month versus \$5 per GB per month in Salesforce.



That means if you have an organization of 1,000 users, your average cost per month is in the region, of \$5,000 and \$60,000 per year.



The following considerations will help you build a Salesforce- SharePoint integration business case for your company:

- > Saving on the recurring cost of your legacy case management system if you decide to replace it with Salesforce and SharePoint.
- > Saving on the storage cost if you use SharePoint instead of Salesforce storage.
- > Optimization of Salesforce license costs by reducing the number of Salesforce users with Salesforce-SharePoint integration.
- > Complying with regulatory requirements to govern and protect sensitive data.
- > Efficiency and/or productivity gain achieved by avoiding switching between multiple systems for content collaboration.
- > Time saved in case resolution.
- > Improved knowledge management and document access leading to a reduction in rework, resulting in faster case resolution.



## Benefits of using our solution

- > Ensure cohesive compliance for content such as documents and emails.
- > A single source of the truth.
- > Enhance content governance with appropriate content classification, protection, data leak prevention and tagging with universal terminology and structure.
- > Storage cost reductions of up to 95% Salesforce license savings.
- > Quicker access to business-critical content.
- > Reduce time spent searching for information by up to 50% .
- > Microsoft Syntex: Content AI to extract additional meta data details form documents.
- > Less distraction and application-switching due to the seamless integration of previously siloed information.
- > Boost collaboration: Microsoft 365 allows for better handling of workloads, especially for remote and cross-functional teams.
- > Automate case management: Use Microsoft 365 best-in-class capabilities to speed up ad-hoc activities to resolve cases in Salesforce quicker.

# Conclusion

Salesforce customers are increasingly considering SharePoint Online integration as a business priority. By transferring documents from Salesforce to SharePoint, your company gains cost and operational efficiencies, extending collaboration across your workforce and with partners, while reducing licensing costs and maintaining user experience.

But integration exercises are complex, requiring precision and in-depth knowledge of source and destination platforms. They are best carried out under the guidance of integration experts. After all, your documents are critical business assets. Errors in movement, confidentiality, management or user access rights may prove expensive.

When Proventeq integrates Salesforce and SharePoint, we get the best from both so our clients have the right tool for their particular needs. To enable this synchronization we can advise on the variety of integration tools available in the market, paying heed to those all-important integration success factors: complete, reliable, automatic, seamless.

For more details, please read <https://proventeq.com/services/sharepoint-integration-with-salesforce>



[www.proventeq.com](http://www.proventeq.com)

## About Proventeq

Proventeq empowers organizations to successfully transition to intelligent workplaces built in SharePoint, Teams & Azure.

Through the application of AI/Deep Learning, we provide augmented content analytics, intelligent classification and metadata extraction, automated migration, information protection and governance solutions.

Proventeq specializes in migration from non-Microsoft to M365. We are a Microsoft Gold Partner and a Microsoft Chartered Partner in Content Services.

To book a consultation please contact [sales@proventeq.com](mailto:sales@proventeq.com)

