

Basati, a Certified Salesforce Consultancy, does consulting the way it should be done. Putting the client's best interest first, and recommending sound, cost-effective and future sighted solutions, which the firm can then implement directly.



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Interview conducted by:
Lynn Fosse, Senior Editor
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CEOCFO: *Mr. Smith, would you tell us about the vision for Basati when you started the company?*

Mr. Smith: The vision was around using Salesforce.com and the strategy for businesses to reach their goals and vision. And how to use Salesforce in order for that to happen.

CEOCFO: *What is the vision today?*

Mr. Smith: The vision is still the same. It is continually evolving platform and continually evolving business world so being able to take a look at what businesses need, what they want and what they are trying to accomplish and still having a solution that actually can work and enhance their strategies is still the vision today and why we do what we do.

"We can do all that in Salesforce. We can help automate that process. We can push that information out to the clients through the community and really allow them to get their answers when and where they need them and not have to wait on us to respond. They become raving fans because they know all about our products and solutions and then get to see and experience it and be a part of it."- Tim Smith

CEOCFO: *What do you understand about Salesforce that other less experienced people do not?*

Mr. Smith: Salesforce.com is a platform. It is a way for a business to automate any process. It is not about sales, it is kind of misnamed in that sense. It is about anything that I want to automate, whether it is internal or sending out to my clients, sending out to prospects, or receiving information from other systems. It is all about what can I automate so that I can focus on what I do best whether that is selling, customer service or accounting. It is about letting me use this system to automate everything daily and let me focus on what is my highest and best use and what is going to make the business and clients the biggest success.

CEOCFO: *When might someone turn to you and how do you help them understand the full range and value of Salesforce?*

Mr. Smith: People generally turn to us as they purchase Salesforce and they need implementation success. They need someone to guide them on how to set it up and how to set up a foundation, at least at the beginning, in order to not lock

themselves into certain situations later. By setting up the foundation they are free to continually enhance it down the road but they do not have to do it all today. The way you talk about all the different things that it can help them with is to take the time to learn their business. I ask them *why* they always use this form or *why* they always use that process. So many times they say it is just because it is the way they have always done it. We want to break that habit. We ask them if they could have the ideal situation, what it would look like to them. From there we talk about the different way that Salesforce or a solution on the platform may be able to make that happen for them.

CEOCFO: *How do you help clients focus?*

Mr. Smith: One of the biggest things I tell them as they are going through the sales process is we are not going to take what you are doing and just replicate it in Salesforce because we would be defeating the purpose. It is still a more powerful system but we are going to take the time to stop and take the white board or a blank sheet of paper and really stop and think. Think about yes I want to do this and this is what I want my ideal situation to be. We guide them with questions. We question them on a regular basis on why they do things this way. By focusing on the 'why'. Einstein said if he had twenty days to solve a problem he would take the first nineteen to define the problem. Let us define your business and define why you are doing things and then we can make it happen in Salesforce.

CEOCFO: *Are clients turning to you through Salesforce: how do people find Basati?*

Mr. Smith: Most of our business comes through Salesforce reps so they are very good at selling their product. It is such a generic product that can help any type of business but at that point, they need someone to guide them with that foundation and setting them up with for their specific business needs and uses. So 95% of the time that is where we get our business. We also get business through people that are very happy with what we have done and they will recommend us.

CEOCFO: *Do you work with companies on an ongoing basis?*

Mr. Smith: Most of the time it is an ongoing basis. We have clients that have been with us for five years now. That does not mean they are doing something every month. They might be ok for a couple of months and then realize they will be rolling out another piece of the cloud or they will roll out another division in their company and then they come back to us. That is one of the things we are proudest of, we keep doing a good job and they keep coming back. Most folks always need some guidance now and then with Salesforce, so keeping that ongoing relationship when they want it and not forcing them to use us every month seems to be very valuable to them and encouraging to us.

CEOCFO: *What is your geographic range?*

Mr. Smith: People can find us all over the US. Our heaviest concentration would be the northeast tri-state area of New York, New Jersey and Connecticut and the states around them. We have clients ranging as far west as Seattle and Anaheim and as far north as Canada. Pretty much throughout the US we have done work.

CEOCFO: *Does it make a difference that you might be closer geographically or is it not relevant today?*

Mr. Smith: Many small companies just want somebody to come in and sit with them. We explain that will be overkill and that they will pay for that time and the hotel, pay for a flight; pay for this and that. We find it is much more productive to be on the phone for two hours with the door shut, nobody bothering and we are focused on doing your work at that time. I would say 95% understand that out of the 40 to 50 clients that say they have to have somebody close or local - we educated them enough for them to understand they did not need that probably at least 70% of the time.

CEOCFO: *Are there certain functions of Salesforce that companies routinely miss?*

Mr. Smith: It is a continual challenge or opportunity that we face. There are so many different things about this Platform and what we usually find is so many times people will still do the report and spin it out into Excel so that they can manipulate it. Why not leave in Salesforce and let Salesforce do the manipulation for you. Then you print out the document if it is for management or an external source or whatever it might be so that they have the information that you want that they need in front of them. Many are using Salesforce as a community nowadays. So many of us keep talking about this customer experience and journey and yet we still make them pick up the phone and call us. We still tell them we will get back to them and we still make them put in their telephone number and then repeat their phone number again when we answer the phone. There are so many things about the customer service world that are old school. We can do all that in Salesforce. We can help automate that process. We can push that information out to the clients through the community and really allow them to get their answers when and where they need them and not have to wait on us to respond. They become raving fans because they know all about our products and solutions and then get to see and experience it and be a part of it. Versus I am a customer calling up and I need help. We have seen more and more folks

that are starting to keep in mind that it is not about sales but about what the processes are that we can automate. However, the two biggest that we have seen would be those output documents and communities.

CEOCFO: *How do you ease what might seem awkward to your clients?*

Mr. Smith: The best way to but any Client at ease is to guide them, hold their hand, have empathy for the fact this is a new world for them. Taking the time to know them and their business allows us to be guides and ease any awkwardness along the way.

CEOCFO: *How is business these days?*

Mr. Smith: Business is good. As a smaller size, but growing, business cash flow is always interesting but business is good. There is never a downside when it comes to Salesforce. Salesforce is the giant in the room that is growing faster than any other software company ever has. The ecosystem around that has a ridiculous amount of need for good quality people that can guide clients through that process. What we have seen that it is not just about sales and yet at least 70% of Salesforce clients only use the sales aspect. It is an \$8 billion dollar a year company and yet 70% of those clients still just use it for leads, accounts, contacts, opportunities, products and maybe a little bit with cases. They do not get into the whole other aspect of the things it can do for them. So the upside potential is huge. As a sales guy and as an entrepreneur it is somewhat frustrating to know that there are all these things we can do but we can only do so much in a day and we need to focus on why this is going to make the biggest bang for their buck and the biggest upside for them today.

CEOCFO: *Is Salesforce educating people?*

Mr. Smith: Salesforce is very good at selling their products. They are a sales machine so they are very good at making sure clients get inundated with all the different possibilities. Having said that, let's call that education, it is information and it is out there. It is up to the partners that are in the shops and the consultants or if it is a large business and they have an internal team it is up to that team, to keep track of, look for and see what else can be done with the possibilities that are available now with the Salesforce platform.

CEOCFO: *What has changed in your approach over time?*

Mr. Smith: One of the biggest things I have learned is what I am good and not good at. And to hire what I am not good at. To focus on my highest and best use and to allow those people that are good at those other things - whether it is details, accounting, or whatever it might be - let them do what they do best. Let them win and let them succeed. Then it will turn out great for the business. It was hard to turn over recruiting and hiring and a lot of things to other people but it was a huge upside once we did. The other biggest thing is to keep moving forward. We have had very interesting challenges in our growth and some things that most companies will never face. We were able to survive through that, work through that, build a team through that, and that has kept us going through those times and poised for the growth that is to come.

CEOCFO: *Why choose Basati?*

Mr. Smith: We believe that by choosing Basati a client gets not a vendor or somebody that is just going to do what they are asked to do. They are actually going to get a partner and a hand-holder to say here is what is possible. Let's focus on today and what is best for you and what is going to make the biggest difference in your life, world and vision, trying to reach your vision for the company for the year. Let us talk about and focus on those things. We will come back to all the other stuff. We do not have to get every dime today; we are talking about making the system work for you and being around as you continually grow in that system but you keep coming back to us for more and more. We are here to help and guide and not here to get every dollar out of you but here to make sure you get what you need today. You are not locked into a company and system that requires you to pay money every month. We want you to want us when it is time to help you build out your platform.

