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The COVID-19 Response Playbook

A Guide for How to Lead and Build
Resilience for the Next Normal

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Foreword

**A NOTE FROM
MARC BENIOFF**

I hope this finds you and your families healthy and safe. This pandemic impacts everyone, reminding us that we're all truly connected and that we have obligations to each other.

At Salesforce, we're working tirelessly to leverage our resources, relationships, and products to help all of us navigate this crisis.

To reach local communities, we're helping to deliver personal protective equipment (PPE) to those most in need. To date, **we've sourced** 50 million units of PPE for doctors, nurses, and first responders on the front lines in the U.S., U.K., France, and India – and our employees **have logged** thousands of hours of pandemic-related service globally.

For business leaders like you, we're partnering with the world's leading experts, and our customers and partners in every region, to make sense of this crisis and how businesses can respond. We're collaborating with our entire ecosystem to synthesize useful insights into step-by-step recommendations to guide you in shaping the best approach.

This playbook presents a simple, organized way to **identify the "no regrets" decisions** you can make now that will prepare you to move out of the crisis in a stronger position – with more flexible operations and greater relevance to customers.

Use this versatile tool to assess where your business is today, as you outline specific actions you can take in the next normal to become more resilient.

I look forward to hearing your story as you bring your organization safely back to the workplace.

Marc

Marc Benioff
Chair and CEO, Salesforce

Contents

Introduction

Business leaders face more uncertainty today than they have for decades. Making decisions during a global pandemic feels risky and uncomfortable. Everyone has an opinion on what to do next.

Based on the advice of global experts and the real experiences of our customers and partners, we developed this response playbook. The phased approach outlined in the next few chapters will help you gain greater clarity and give your teams much-needed structure and guidance.

How can you make "no regrets" decisions today as the next normal unfolds? Use this playbook to map your response journey and support day-to-day decisions at the speed and scale now required of all businesses.

Navigating Economic Uncertainty

In addition to not knowing how the virus will progress, we are all operating in a time of massive economic uncertainty.

Research identifies four models of potential economic outcomes. However, no model fits every region, which only adds to the uncertainty.
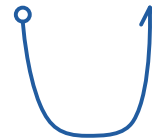
Consider these outcomes as your team develops scenario planning.

Potential Economic Outcomes
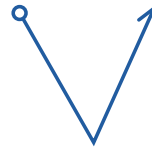
V-shaped

Recovery with a possible short lived boom, driven by huge stimulus needed for a hard stop to the pandemic. This would be a surprise scenario.

U-shaped

Recovery based on a longer crisis, driven by a more modest response to the pandemic. This appears increasingly likely.
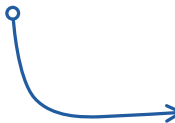
L-shaped

Non-recovery of a decay into depression, driven by failed responses to the pandemic and economic crisis. This would represent a deep and long global depression due to the interconnectedness of world economies.
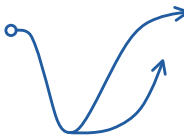
Y-shaped

Recovery is a combination of U- and L-shaped recoveries – in this (likely) case, the economy divides into two tracks: fast and slow sectors that represent fast and slow recoveries.

What Is the Best Path to the Next Normal?

We all left the old normal behind when we were asked by our leaders and employers to stay in our homes. Now we find ourselves in the new normal of COVID-19. And, the big question remains: What will the next normal look like?

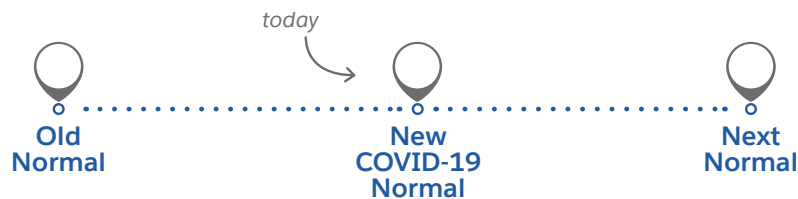One thing we do know is that we will never return to the old ways of doing business. The crisis accelerated change in ways that will transform the way we live and work for years to come.

This means that business leaders need to ask two core questions:

- What decisions can I make now to ensure my business is resilient in the next normal?

- How can I make sure that I see the signs for change early enough, so I can act quickly when the time is right?

You can't do everything at once – so consider the phased approach we explain in the next section.

A Structured Approach Mapped to Your Readiness

We found that taking a structured approach – divided into three distinct, yet often concurrent, tracks – helps guide and simplify decision-making.

Track 1
Stabilize

Mitigate short-term risks and stabilize operations.

Execute a robust, in-crisis response to protect and run the business during lockdown.

*CRISIS
RESPONSE CENTER*

Track 2
Reopen

Plan and orchestrate how to return to the workplace.

Put in place the planning, logistics, and communications to resume operations while protecting employees.

*WORKPLACE
COMMAND CENTER*

Track 3
Grow

Accelerate change to grow in the next normal.

Accelerate digital transformation to become faster and more relevant to customers than before the crisis.

*NEXT-NORMAL
TRANSFORMATION OFFICE*

Business Units May Operate at Different Speeds

Different businesses, industries, and geographies will operate at different paces. Even within your company, it's possible for one part of the business, like a department or region, to be within its own track.

For example, one business unit may be struggling to stabilize because its leaders don't have easy information access or processes to make fast operating decisions. In those cases, teams will spend more time stabilizing before embarking on an effort to return to the workplace.

On the other hand, some organizations will already be well into a massive growth phase because they were born digital or the current market has increased demand for their products and services.

Readiness

Time

Track 1
Stabilize

Track 2
Reopen

Track 3
Grow
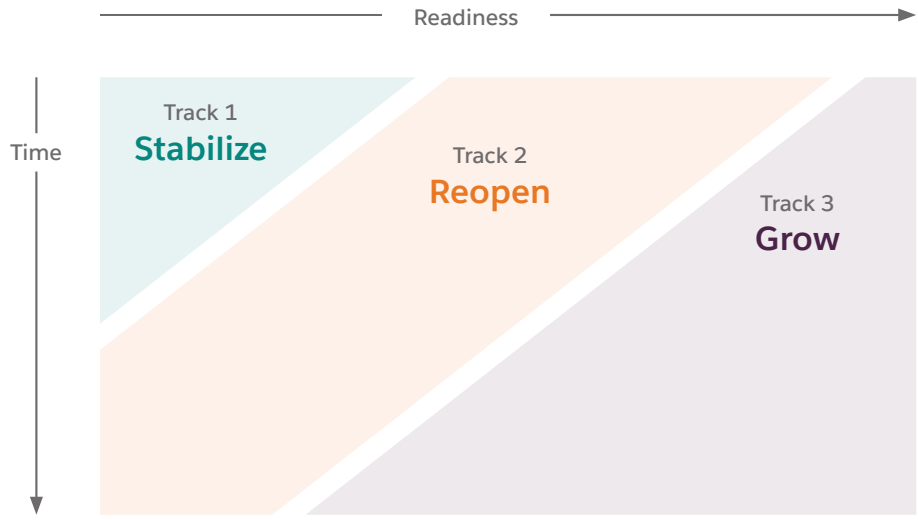
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Four Customer-Centric Capabilities

Now that you have a clear view of the three tracks, the next step is to break each track into much more granular actions you can take.

Salesforce can help you bring a **customer-centric mindset** to your approach. Consider how you evolve these four capabilities below to improve your crisis response and resilience. Each further reinforces your customer-centricity, empowering your employees. Salesforce is uniquely able to help you in each of these areas.

How You Make Decisions	→	Structured planning and information gathering Accelerated and delegated decision-making Establishment of a data culture with clear instrumentation, visualization, and new KPIs
How You Work	→	Internal communications cadence Collaboration and increased productivity Upskilling and reskilling: new ways of working
How You Engage Customers	→	Reprioritization of effort toward customers Redesign of customer experiences and offers based on new needs Deeper personalization through digital
How You Serve Society	→	Business as a platform for positive change Culture of giving Civic leadership supporting employees, communities, and governments

Where Are You in Your Response Journey?

In evaluating their own crisis response, customers have found it helpful to consider the three tracks by breaking them down into the four customer-centric capabilities.

Follow this approach to ensure you structure your response around your customer.
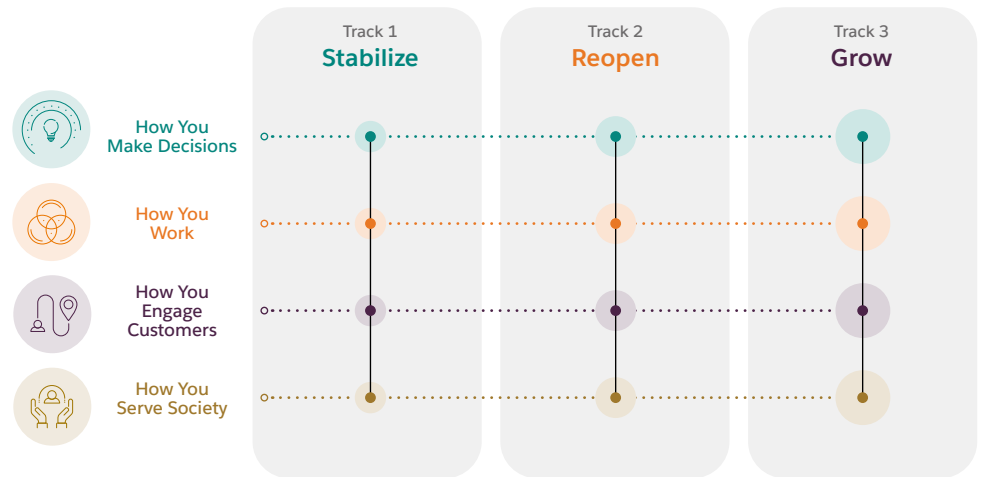
Use this framework to reflect on the strongest areas of your crisis response and where you need to make significant progress.

You may wish to pursue all three tracks at the same time by assigning task forces within your organization, but you need to make important decisions in each track to ensure a smooth transition from one to the next.

Get more details on what's needed for each track in the next three chapters.

Track 1: Stabilize

The crisis may be unfolding around you. This stabilize track is about protecting your staff and running your business as best you can amidst those challenges.

As a leader, you likely began responding by setting up a dedicated crisis response team to define options, risks, and actions across departments.

Your stabilize plan should include how you make decisions, how you work, how you engage customers, and how you serve society.

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Overview of Recommendations

Review this graphic for a high-level overview of what your stabilize priorities should be for each customer-centric capability. Then, for each capability, see its checklist for considerations and possible actions to take with your team.

MITIGATE SHORT-TERM RISKS AND STABILIZE OPERATIONS

HOW YOU MAKE DECISIONS

Establish a crisis command center.

Establish stabilization team, war room, and plan. Gather the right insights (data, feedback, and scenarios) to plan and iterate your response.

Make swift resource decisions.

Re-prioritize effort, focusing time and resources on new urgencies, reinforcing key initiatives with sufficient bandwidth.

Initiate a data culture across the company.

Build and distribute reusable datasets and dashboards to enable faster decision-making.

HOW YOU WORK

Define and execute the stabilize work plan.

Define and communicate the work plan, making it easy to provide feedback; reinforce leadership transparency and visibility.

Rebuild employee productivity.

Ensure remote connectivity; streamline workflows and automate overly inefficient processes; implement training for new tools processes.

Support employee wellness.

Supercharge your employee help portal with information to clarify employee support programs and resources; create cadence of insights and advice to employees.

HOW YOU ENGAGE CUSTOMERS

Rapidly engage priority customers.

Make it easy for customers to reach you digitally; prioritize outreach based on need and lifetime value; analyze changing needs.

Realign value propositions to customer priorities.

Rapidly innovate offerings and messaging to better serve immediate customer needs.

Optimize your digital engagement model.

Increase performance of existing digital programs to generate scale and response effectiveness.

HOW YOU SERVE SOCIETY

Prioritize goals and shift resources to new needs.

Build in-crisis plan; redeploy resources based on strengths; programmatize donation, grant management, and pro bono efforts.

Mobilize your workforce to volunteer.

Enable employee giving to focus on highest impact areas; update volunteering protocols and partner with trusted organizations.

Communicate transparently, track impact, and iterate.

Clearly communicate how your business is a platform for change; develop giving dashboard to monitor impact; support employee resource groups (ERGs).

How You Make Decisions

Making decisions occupies a majority of your time as a leader. There's no silver bullet to make those decisions easier – your choices significantly impact customers and employees. But if you focus your decision-making around swift, insight-driven decisions, you can redirect your company's resources to the most critical areas of your COVID-19 response.

Establish a crisis command center.

☐ **Establish stabilization team and war room** to focus information gathering and decision-making.

☐ **Create a "Stabilization" V2MOM** to align around a single response strategy at the corporate level.

☐ **Develop action plans** across (i) employees, (ii) customers, (iii) operations.

☐ **Build intelligence dashboards** to simplify and accelerate decision-making.

☐ **Model scenarios** – financial, operations, market.

☐ **Capture feedback** from employees, customers, suppliers, and partners.

Make swift resource decisions.

☐ **Prioritize, realign, and repurpose** management time and resources according to new urgencies, reinforcing key initiatives with sufficient bandwidth.

☐ **Implement cost controls** and cut nonessential expenses.

☐ **Stop nonurgent initiatives** to avoid distraction.

☐ **Put in place and manage contingency plans** for disrupted people and operations.

Establish a data culture across the company.

☐ **Build and distribute reusable datasets and dashboards** to enable faster and better data-driven decision-making at more junior levels.

☐ **Determine customer lifetime value** measure to aid financial relief and other decisions; programmatize at scale.

☐ **Build accountability performance matrix** to enable a total view of the business by product, geography, and customer segment.

☐ **Build deeper analytics models** of changing market and identify new decision variables.

V2MOM Approach

The **V2MOM** is a simple framework for alignment and leadership. It boils down to these five questions:

Vision: What do you want to achieve?

Values: What's important to you?

Methods: How do you get it?

Obstacles: What is preventing you from being successful?

Measures: How do you know you have it?

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How You Work

Use this time to develop and execute a plan to support your employees' wellbeing, while ensuring they can stay productive in new environments. Prioritize their physical and psychological safety. You'll likely have to rethink processes, tools, and technology as you evolve your traditional ways of working.

Define and execute stabilize work plan.

☐ **Create a "Crisis Taskforce and Response" V2MOM** focused on employee safety, productivity, and wellness.

☐ **Segment workforce** to enable clear and targeted communications.

☐ **Clearly communicate the plan,** tailored to each segment, ensuring steady and frequent situation updates, new policies, and guidance.

☐ **Make it easy to provide feedback,** through multiple, low-friction channels (respond to employee questions, feedback, and ideas).

☐ **Reinforce leadership** visibility and transparency with regular virtual all-hands meetings.

Rebuild employee productivity.

☐ **Ensure connectivity** for remote employees with secure email, VPN, and web conferencing.

☐ **Streamline workflows and automate inefficient human processes** (billing, order tracking, etc.) to remove friction.

☐ **Implement training for new tools and processes,** including decision support and virtual collaboration.

☐ **Provide tips and training on how to best communicate with customers and colleagues** (e.g., build empathy and provide active listening).

Support employee wellness.

☐ **Clarify assistance programs and resources** available to employees (childcare, financial planning, mental health).

☐ **Create regular cadence of storytelling** with insights and tips from employees, experts, and customers.

☐ **Establish employee help portal** to provide access to all services (IT, HR, finance, etc.); identify and prioritize new offerings based on query analytics.

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How You Engage Customers, Partners, and Suppliers

Even as you're stabilizing your business, you can connect with and support your customers, partners, and suppliers. Establish where and how you're available to communicate with them, and consider introducing new services or products that will especially help in their new context.

Rapidly engage priority customers.

- [ ] **Set up remote call center** to respond to increased inbound service demands.

- [ ] **Engage customers in priority order** on the basis of (i) need, (ii) customer lifetime value score, (iii) fast ROI.

- [ ] **Reduce friction** in existing deal cycles using all levers possible.

- [ ] **Listen at scale to customers and partners through digital roundtables** to learn emerging customer needs and share best practices.

- [ ] **Leverage service case data** to identify customer experience improvements.

- [ ] **Define and publish FAQ pages** for all stakeholders.

Realign value propositions to customer priorities.

- [ ] **Rapidly innovate products and services** to better meet immediate customer needs.

- [ ] **Shift messaging** to be more human, empathetic, and personalized to crisis needs.

- [ ] **Resegment customer base** by crisis-driven needs and lifetime value score.

- [ ] **Cocreate business continuity plans** with partners and suppliers to streamline operations.

Optimize your digital engagement model.

- [ ] **Increase performance of existing digital channels** to generate greater scale and response effectiveness.

- [ ] **Focus human effort on highest need cases,** using self-service channels, predetermined traffic routing rules, and automation.

- [ ] **Help suppliers and partners** optimize for emerging offerings through communities and portals.

- [ ] **Monitor social channels** and respond quickly on real-time conversations.

How You Serve Society

Your company can play a pivotal role in serving your community during tough times. As part of your stabilizing motion, determine and communicate how your company can best give back. Consider tangible resources (like products and money), as well as employee time for volunteering.

Prioritize goals and shift resources to new needs.

- [ ] **Create a "Serve Society in Crisis" V2MOM,** defining focus areas and priorities for donations and grants.

- [ ] **Redeploy resources and capabilities** to serve societal needs, based on organizational strengths (products, services, team expertise).

- [ ] **Centralize donation and grant management** to maximize impact for disaster relief and economic recovery.

- [ ] **Establish customer support program** to match customer needs to pro bono support from your company.

Mobilize your workforce to volunteer.

- [ ] **Focus employee giving on delivering** assistance to organizations that provide crisis-relevant near- and long-term relief.

- [ ] **Update volunteering protocols** to align with company crisis guidelines.

- [ ] **Create partnerships** with other trusted organizations in support of the crisis.

- [ ] **Crowdsource ideas** by opening a request or help line for how best to help.

Communicate transparently, track impact, and iterate.

- [ ] **Clearly communicate** how your business will be a platform for positive change in the crisis.

- [ ] **Create a "giving dashboard"** to monitor and analyze impact with real-time data.

- [ ] **Support employee resource groups (ERGs)** with guidance for giving talent and resources aligned to their values.

Success Stories

Piedmont Health

In need of a triage process to handle a drastic increase in inbound calls, Piedmont Health partnered with Slalom to implement a solution for tracking and management of COVID-19 patients. This enabled nurses and agents to guide patients through a series of questions that focused on risk, exposures, and active symptoms to appropriately triage patients to the right level of care. Slalom created a dashboard to track call volume, patient source (new or existing), call source, COVID-19 travel destinations, symptoms, and outcomes. The final product included quickly setting up a COVID-19 hotline and training more than 40 triage nurses and 40 contact center agents, all first time users of Health Cloud.

AAA Carolinas

AAA Carolinas is over 2.1 million members strong, and after it was forced to temporarily close retail branches due to COVID-19, 228 employees pivoted from their existing roles to focus on a new member outreach program using Service Cloud that enabled them to create cases and conduct personalized outreach to customers. The program was spun up in just five days and, one week after kicking off, the team completed over 25,000 member calls, with over 80% of customers who were reached expressing appreciation for the call. Taking this further, personalized campaigns segmented members using Marketing Cloud then provided supplemental details based on their initial agent contact experience.

Syneos Health

Clinical research firm Syneos Health is supporting those on the frontlines with the launch of an educational program for doctors around alternatives to ventilators. Using Salesforce Care solutions and Health Cloud, the company is able to rapidly spread the word about its BiPAP machines, which help stabilize intubated patients and can help alleviate the need for ventilators. In the future, the company plans on using the self-service portal, which will allow doctors to get answers directly and quickly, reserving agent bandwidth for more complex cases. Learn more **here**.

Track 2: Reopen

Your initial response to COVID-19 is about stabilization. Then, it's time to set the wheels in motion to reopen your workplace.

Even as you're mobilizing different teams to reopen – from real estate and IT to employee success – you're also preparing for the possibility of another outbreak and shelter-in-place period.

Listening is a key muscle to flex in this track. Ask your team to listen through surveys, one-on-one meetings with customers, analysis of customer service trends, and more. Translate insights into action and extend that knowledge through your entire ecosystem of suppliers and partners.

Overview of Recommendations

Review this graphic for an overview of what your reopen priorities should be for each customer-centric capability. Then, for each capability, review the checklist for considerations and possible actions to take with your team.

PLAN AND ORCHESTRATE A RETURN TO THE WORKPLACE

HOW YOU MAKE DECISIONS

Establish a workplace command center.

Build a team and mobile command center. Gather key data to help with planning. Partner to resolve tough questions.

Define holistic plan.

Build a unified plan to get back to work, defining mobilization, logistics, and support. Establish overall workplace policies, especially around COVID-proofing and containment reactivation.

Unify feedback and decision-making.

Instrument the return to work with a single source of truth, augment insights through multiple feedback loops, and communicate liberally.

HOW YOU WORK

Execute staged reopen work plan.

Cascade plan, targeting communications according to needs and situation. Review and adopt workforce protection regulations.

Enable employees with tools for the new paradigm.

Activate multiple channels for employees to get information through portals and training, provide feedback (for example, through a hotline), and get help through wellness tools.

Return to the workplace with greater flexibility.

Enable increased work flexibility, including staggered shifts. Take account of parental needs. Optimize hiring and skills decisions.

HOW YOU ENGAGE CUSTOMERS

Deeply understand changing customer needs.

Deepen listening programs to identify evolving buying and service experience needs.

Rebuild trust through personalized experiences.

Redesign simpler, more personalized, and more automated experiences. Enable employees with training and scripts.

Cultivate robust ecosystem resilience.

Deepen partner and supplier relationships through enhanced collaboration, playbooks, and processes.

HOW YOU SERVE SOCIETY

Demonstrate empathy within your community.

Empower and enable teams to serve local needs and form local partnerships. Invest in and communicate impact locally and transparently.

Operationalize your culture of giving.

Programmatize volunteer management and expand grant management. Commit to equality-enhancing programs.

Double down on sustainability as you emerge from the crisis.

Establish sustainability as a key decision factor in all post-crisis investments, including real estate.

How You Make Decisions

Your decision-making in this track should focus on the new, evolving needs of your internal and external stakeholders. Get ready, because your leaders will have a lot of questions. Be proactive by setting up a command center and designing a data-driven plan to get everyone back to work. Think holistically to ensure you're accounting for all voices and feedback.

Establish a workplace command center.

- [ ] **Set up a workplace command center** to coordinate people, policy, and notifications.

- [ ] **Build a mobile command center** with dashboards, reports, and collaboration feed as a single source of truth.

- [ ] **Define data sources (existing and new)** to enable optimal decision-making, including employee health, physical density, and sanitation status.

- [ ] **Enable advanced data modeling** (scenario planning, what-if analysis, and risk modeling) with dashboards, public datasets, and internal employee/site data.

- [ ] **Partner to answer key, unresolved questions** (e.g., how to segment and engage at-risk populations, health data management, and "questions we didn't know to ask").

Define a holistic plan.

- [ ] **Build a unified plan** for cascading notifications, work plans, and effort needed to activate return.

- [ ] **Define mobilization, logistics, and support plan,** including COVID-proofing, testing tool procurement, move sequencing, and space management (e.g., target employee density in office space).

- [ ] **Define health attestation requirements** and process, including contractor and visitor policies.

- [ ] **Define reopen operating model at department/business unit level,** modeling potential scenarios on customer/operations/ employee impact.

- [ ] **Define phased containment plan** in case of localized lockdown reactivations.

Unify feedback and decision-making.

- [ ] **Instrument a return to the workplace** with a single-truth view of all critical data, including employee segmentation, schedules, and completion.

- [ ] **Collate customer/employee feedback and insights** and synthesize into improvement opportunities and shareable insights.

- [ ] **Ensure timely, trusted cadence** of updates to all parties: employees, suppliers, partners.

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How You Work

This is where employees across departments will start to see your new plan take shape. Execute your reopen plan with the right tools and processes, ensuring employee safety and work-life balance. Greater flexibility for employees, including parents, is key to your company's return to the workplace – and so are multiple channels and tools for employees to get information.

Execute staged reopen plan.

☐ **Cascade reopen plan** to employees, including planning templates, logistics, and schedule.

☐ **Establish information portals for furloughed and remote workers** to enhance access to must-have information, including back-to-work policies and resources.

☐ **Communicate new ways of working,** including expectations on social distancing and health attestation, as well as real estate policies (visitors, etc.).

☐ **Execute employee attestation process,** including wellness certification and tracking.

☐ **Review and adopt new workforce protection regulations** in alignment with government policies and healthcare experts.

Enable employees with the tools for a new paradigm.

☐ **Activate employee portal** with up-to-date resources and policies.

☐ **Adjust onboarding and training** based on new ways of working, updated products, services, and offerings.

☐ **Establish hotline for "see something, say something" and inquiries** via phone, web, text, and internal social feed.

☐ **Establish travel advisory** to enforce policy, advise, monitor, and track all travelers.

☐ **Support mental health needs** with employee wellness apps and enhanced counseling services.

Return to the workplace with greater flexibility.

☐ **Enable increased work flexibility,** including ramping up or staggered shifts.

☐ **Align on employee childcare needs** to support employee at-home needs with back-to-the-workplace schedule.

☐ **Centrally review new skills and roles** based on market changes.

☐ **Explore overall best hiring options** (hiring, reskilling, contractors, labor partnerships, gig economy approaches, etc.).

How You Engage Customers, Partners, and Suppliers

How you engage customers starts with listening. Invest in understanding your customers' new realities – the work will pay off later. Partner with your broader ecosystem across partners and vendors to deliver experiences together that meet customers' evolving needs. Personalize experiences and communication across sales, marketing, service, and other departments.

Deeply understand changing customer needs.

- [ ] **Capture evolving customer needs** through programmatic focus groups and customer advisory boards.

- [ ] **Adapt value propositions and offers** to serve near-term market demands.

- [ ] **Capture shifts in how customers want to engage,** including new buying and service experience needs.

- [ ] **Evolve data strategy based on new data requirements** to ensure safe physical customer experiences.

- [ ] **Establish ethical use advisory board** and guidelines to govern health and other sensitive data usage.

Rebuild trust through personalized experiences.

- [ ] **Recommunicate who you are** with evolved messaging and offers based on market insights.

- [ ] **Advance self-service (and touchless) capabilities** across all channels.

- [ ] **Make it easy for customers to find information** they want to make decisions.

- [ ] **Script your call center agents and sales teams** with reopen-the-workplace knowledge base and AI-powered recommendations.

- [ ] **Prioritize automation** to replace inefficient human processes (billing, order tracking, etc.).

- [ ] **Train and enable reps** for new sales environment: processes, deal guidelines, reporting and analytics, deal/customer prioritization, and new communication and collaboration expectations.

Cultivate robust ecosystem resilience.

- [ ] **Formalize new go-to-market partnerships** with programs and technology.

- [ ] **Reinvent channel strategy** for greater collaboration and data sharing.

- [ ] **Align effort with playbooks** that define actions, milestones, and what-if responses.

- [ ] **Deepen public sector partnership** for contact tracing to maximize safety at every customer touchpoint.

How You Serve Society

Empathy and a culture of giving start at the corporate level. Enable and empower employees to serve society as you reopen and emerge from crisis. Support local communities and give back through equity, product, and time. And reconsider your company's environmental impact in everything you do post-crisis.

Demonstrate empathy within your community.

- [ ] **Locally identify community needs** and broadcast how to help.

- [ ] **Make it easy for local teams to coalesce** and serve local needs.

- [ ] **Form local partnerships** with schools, hospitals, and other critical community resources.

- [ ] **Invest in reskilling and upskilling your community** by providing free training and guidance on market-relevant skills.

- [ ] **Communicate your impact locally and transparently,** truthfully, and with compassion.

Operationalize your culture of giving.

- [ ] **Programmatize volunteer management** to match volunteers with organizations, track volunteer hours, and report impact.

- [ ] **Expand grant management program** to include feedback on impact and opportunities for volunteering.

- [ ] **Sense and respond to new ideas** from employees to refresh ways to serve, volunteer, and donate.

- [ ] **Commit to providing career development opportunities** for highly skilled and under-credentialed candidates as the economy recovers.

Double down on sustainability as you emerge from crisis.

- [ ] **Establish sustainability as a key decision factor** in all post-crisis investments, including real estate vs. remote work and corporate travel policies.

- [ ] **Rethink your geographical centers** and consider moving to "second (or third) cities" to close the wealth gap and allay health concerns within dense urban areas.

- [ ] **Share data responsibly for good** with trusted global organizations focused on societal change.

Success Stories

Common Sense Media

Common Sense Media turned around a solution in 10 days to launch an online resource to help parents, educators, and children to do distance learning, using the Salesforce Platform for marketing and customer service.

Noodle.ai

Noodle.ai, an enterprise AI software company serving manufacturing and supply chain customers, pivoted during this pandemic to adjust its data science algorithms to be helpful to its customers, delivering near-term insights to predict demand for food and other essential goods during COVID-19. The company uses Sales Cloud and Pardot to proactively find companies with similar challenges who want to manage through – and beyond – this crisis. Noodle.ai's intention is to help our planet keep supply chains running and essential goods flowing to the people that need them to survive and thrive.
Learn more at **noodle.ai**.

Robert Half

Robert Half uses the Salesforce Platform for its new Hello to Hire recruiting program. The program rapidly places qualified furloughed retail workers with call center positions to meet high demand for remote service agents.

Track 3: Grow

Once operations are stabilized and your offices reopened, you can once again focus on the growth of your business. In this track, you accelerate change to grow in the next normal.

As a leader, this is where you get the opportunity to drive a growth agenda and come out of this crisis even stronger. Make your vision a reality by assembling the right team – we call it a next-normal transformation office.

This will be your go-to crew as you create an engaging employee experience, recenter around customers, and shape your organization into a platform for change.

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Overview of Recommendations

Review this graphic for an overview of what your growth priorities should be. Then, for each capability, review the checklist for considerations and possible actions to take with your team.

ACCELERATE CHANGE TO GROW IN THE NEXT NORMAL

HOW YOU MAKE DECISIONS

Establish next-normal transformation office.

Create Office of Transformation; publish CEO-level vision as true north; align leadership.

Define the target digital operating model.

Build target digital operating model to unify IT and business, with clear digital governance model; unlock value of data; automate for speed.

Continuously sense change and respond with agility.

Define and enable business performance matrix, including new KPIs for experience; augment gathering of customer and employee feedback.

HOW YOU WORK

Supercharge employee productivity.

Leverage growth industry best practices; simplify finding answers; enable citizen developers; automate onerous processes.

Enable lifelong learning and development.

Enable companywide skills analysis; simplify learning with tailored online learning journeys; upgrade reskilling and source for diversity.

Foster an employee-friendly workplace and culture.

Create multiple avenues for employee feedback; enhance focus on community and work environment; evolve wellness resources to serve aging workforce and mental health issues.

HOW YOU ENGAGE CUSTOMERS

Redesign business processes to be customer-centric.

Audit and redesign business processes to differentiate based on speed and simplicity in serving the customer's "job to be done."

Enable the full power of your company.

Enable one team to serve the customer through a single source of truth and customer journeys; supercharge partners and suppliers.

Innovate at the speed of market change.

Sense change rapidly in the market and respond with agility, enabling the business to deploy new digital capabilities at speed.

HOW YOU SERVE SOCIETY

Connect doing good to doing well.

Measure and report your societal impact, including as part of earnings.

Be a platform for change in the world.

Orchestrate action, via partnerships, to engage executives and employees around UN Sustainable Development Goals (SDGs); spotlight heroes to generate momentum.

Triple down on sustainability for the long term.

Appoint a chief impact officer; develop a net-zero plan and execute.

How You Make Decisions

In the next normal, your transformation office will help bring your vision and strategy to life. Establish a **V2MOM** to drive alignment around that strategy. V2MOM stands for vision, values, methods, obstacles, and measures, and it's a valuable way to make sure key milestones are actually hit on your journey to high-impact change.

Establish next-normal transformation office.

- [ ] **Create an Office of Transformation and V2MOM** to drive corporate alignment around the next-normal strategy.

- [ ] **Publish a CEO-level transformation vision** to align everyone on the mission and overall target outcomes for transformation.

- [ ] **Audit and reimagine priority customer and partner experiences** to increase relevance, simplicity, and speed.

- [ ] **Build business cases for high-impact change** across customer experience, new ways of working, and core operations.

Define the target digital operating model.

- [ ] **Align IT and the business around the target digital operating model** that will bring the CEO vision to life.

- [ ] **Create a single enterprise digital governance model** that underpins the digital operating model.

- [ ] **Unlock the value of data** through a "build once, reuse infinitely" API network model.

- [ ] **Automate** decision-making for greater speed, especially for known work patterns.

Continuously sense change and respond with agility.

- [ ] **Define and instrument a business performance matrix** to enable a complete view of business across every product, region, and customer segment.

- [ ] **Define and instrument next-normal KPIs** around the customer, employee, and ecosystem experience.

- [ ] **Augment sense and respond capabilities** to extract insights from customer advisory boards, NPS and surveys, customer value data, and other sources.

- [ ] **Extend data and insights** to suppliers, partners, and broader ecosystem.

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How You Work

Your company culture is how you'll build a path forward. Closely evaluate your culture and talent to see where you can better enable your workforce in the next normal. Optimize for productivity while building an environment of learning, community, and wellness. Now's the time to be more friendly toward remote and flexible work options.

Supercharge employee productivity.

- [ ] **Leverage global growth industry best practices** (e.g., onboarding, time to effectiveness, employee alignment).

- [ ] **Simplify finding answers** for employees through multichannel knowledge base activated with bots.

- [ ] **Enable business people to build powerful apps** through low- and no-code platforms and augmenting teams with design expertise.

- [ ] **Automate processes across front, middle and back offices** to drive speed, simplicity, and cross-team collaboration.

- [ ] **Personalize employee journeys** with contextual, relevant information and recommendations.

Enable lifelong learning and development.

- [ ] **Equip every employee with a skills profile,** enabling corporatewide skills analysis and optimized opportunity matching.

- [ ] **Simplify learning for must-have skills** enabling fast and easy upskilling to support digital transformation and new ways of working.

- [ ] **Upgrade reskilling** with workforce needs assessment, tailored online learning journeys, and career opportunities.

- [ ] **Source for diversity** and reexamine job descriptions to ensure qualification requirements attract a diverse candidate pool.

Foster an employee-friendly workplace and culture.

- [ ] **Create multiple avenues for employee feedback** to increase transparency and enable fast improvement (surveys, social channels, etc.).

- [ ] **Evolve new working practices** with a focus on community and environment.

- [ ] **Evolve health and wellness resources** to address employees' shifting physical (aging) and mental needs.

How You Engage Customers, Partners, and Suppliers

Customer-centricity was the name of the game before COVID-19, but now, it's even more critical. Focus on customer-centricity by **redesigning processes** around your customers, not your silos or departments. Innovate along with your external partners, who can help you scale and reach new customers. You've never been closer to unlocking the full power and potential of your company.

Redesign business processes to be customer-centric.

☐ **Systematically audit customer moments based on "job to be done"** to identify pain points and differentiation opportunities.

☐ **Design and enable customer journeys at scale,** using self-service channels, predetermined traffic routing rules, and automation.

☐ **Streamline key customer touchpoints** such as onboarding and issue resolution to increase speed and reduce effort.

☐ **Leverage best practices from high-tech, high-growth companies** to improve employee effectiveness in serving customers.

Enable the full power of your company.

☐ **Create a single source of customer truth** to put all teams on the same page by aggregating multiple data sources.

☐ **Design and execute customer experience journeys** with rules- or AI-triggered next best actions for speed and simplicity.

☐ **Enable suppliers and partners** to see a real-time view of demand (via community portal) to optimize their business with you.

☐ **Reconceive your business as a platform,** enabling your partners to serve your customers.

☐ **Train and enable reps** for new sales environment: processes, deal guidelines, reporting and analytics, deal/customer prioritization, and new communication and collaboration expectations.

Innovate at the speed of market change.

☐ **Leverage service case data** to identify highest priority improvements and investments.

☐ **Supercharge market listening** via idea portals, surveys, customer advisory boards, and listening tours.

☐ **Enable business analysts as "citizen developers"** to accelerate digital efforts closer to customer needs.

☐ **Develop reusable processes and components (datasets, APIs)** to accelerate application development through maximum reuse.

How You Serve Society

Business is the greatest platform for change. In the next normal, commit to ongoing service to your community through volunteering, sustainability, and giving back. Consider appointing a chief impact officer to triple down on your company's efforts to do well by doing good. When you speak to employees, highlight internal successes and heroes to maintain enthusiasm and encourage others.

Connect doing good to doing well.

☐ **Formally communicate your societal impact** progress as part of the earnings process.

☐ **Measure and report your impact** to identify current status and overall improvement.

☐ **Establish an Office of Ethics** to elevate awareness of and focus on key ethical considerations related to financial and operational decisions.

Be a platform for change in the world.

☐ **Identify the areas for corporate focus** aligning to UN Sustainable Development Goals (SDGs).

☐ **Partner with nonprofit organizations** that support your mission.

☐ **Encourage key executives to lead through example** to foster corporatewide momentum around initiatives.

☐ **Consider the 1-1-1 model,** codifying a sustainable model for giving time, talent, and hard assets and human resources.

☐ **Devote a PR and marketing effort** to generate initiative momentum and support.

☐ **Spotlight internal successes and heroes** to encourage others.

Triple down on sustainability for the long term.

☐ **Appoint a chief impact officer** to orchestrate corporatewide initiatives and maintain enthusiasm.

☐ **Define net-zero plan,** and initiate change efforts to achieve it.

☐ **Support the UN SDGs,** creating greater companywide knowledge and interest in them.

Success Stories

Keen

Keen launched an initiative to connect healthcare workers, and those at home, in need of new shoes with up to 100,000 pairs (about $10,000,000 in value). A nomination process was quickly developed and launched on Commerce Cloud to capture customer information and begin delivering shoes to those most in need.

TentCraft

TentCraft, a custom tent manufacturer, quickly pivoted its manufacturing business to provide mobile, high-quality drive-thru screening tents for healthcare professionals on the front lines of COVID-19 relief efforts. TentCraft leveraged Sales Cloud to manage customer relationships, and Pardot to build, test, and deploy quick, scalable campaigns that delivered highly personalized content. With a strong digital footprint across the ecosystem, TentCraft is able to ensure alignment across the supply chain to quickly pivot its manufacturing business and build safe and secure temporary testing environments.

Theragun

Theragun connected customers through Commerce Cloud to drive donations of 250,000 meals through Feeding America, and now are set to donate 300+ Theraguns and thousands of masks to hospitals around the world in addition to exclusive discounts for first responders and the military.

How Salesforce Solutions Can Help

At Salesforce, Customer 360 is the complete portfolio of Salesforce technology. It enables you to put the customer at the center of everything you do.

Salesforce Customer 360

Customer 360 allows every employee, whether in marketing, sales, commerce, service, or IT, to access the right data, insights, and tools to collaborate around the customer and deliver personalized experiences.

Since COVID-19, Salesforce has enhanced Customer 360 to deliver even more value for you, regardless of where you are on your crisis response journey.

Salesforce Customer 360
Built on the World's #1 CRM Platform

FOR LEADERS

- V2MOM Template
- Connect Your Data
- COVID-19 Command Center
- COVID-19 AppExchange

FOR EMPLOYEES

- Sales
- Service
- Marketing
- Enablement

FOR CUSTOMERS

- Digital, Personalized Journeys
- Always-Open Storefronts
- Omni-Channel Service
- Custom Apps

Making Decisions

Salesforce created **Work.com** to provide advisory services and technology solutions to help companies stabilize and reopen safely.

To accelerate decision-making, Salesforce shares the power of a workplace command center to be single hub for leaders to make informed decisions on how to monitor, adjust, and manage reopening communities and businesses.

Solutions include Contract Tracing, Shift Management and Planning, the Tableau COVID-19 data hub, Employee Wellness Checks, and a companywide vision alignment tool called the **V2MOM**.

1 | Work.com Command Center
Monitor return-to-work readiness, make data-driven decisions, and communicate more effectively.
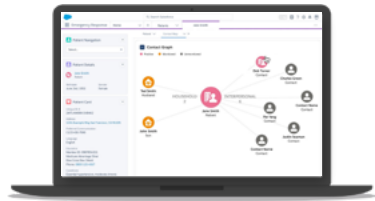
2 | COVID-19 Data Hub
Jumpstart analysis with publicly available datasets from Tableau's COVID-19 Data Hub.

3 | Crisis V2MOM
Enable everyone to build holistic plans using Quip and the Salesforce **V2MOM** template.

TACTICS

Crisis V2MOM templates in Quip	Integrate transaction data and demographic data	Salesforce Maps
V2MOM exercise	Correlate market data with consumer transaction data	Salesforce Surveys
Automated alerts and triggers based on new policies	Tableau data visualization (mobile, collaborative)	Field service scheduling
Automated attestation and compliance processes	Dedicated war room dashboards	

How You Work

To help employees work together remotely and learn new skills during the crisis, customers can access Salesforce Care, Quip Work from Home, and our online learning platform, myTrailhead.
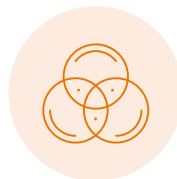
To automate incident response operations and coordinate resourcing, additional solutions include Emergency Response Management and Shift Management and Planning.

1 | Salesforce Care
Stay connected to employees and customers and make data-driven decisions.
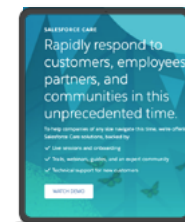
2 | Quip Work from Home
Try this virtual collaboration tool to help teams work from home.

3 | myTrailhead
Skill up your workforce with this online learning platform to meet new business demands.

TACTICS

Weekly company all-hands meetings

Daily employee success emails

Employee surveys

Bot-assisted employee knowledge base (Concierge)

V2MOM app

Employee and candidate journeys

On-demand virtual collaboration training

Mental health and mindfulness programs

Self-service help center for employee crisis needs

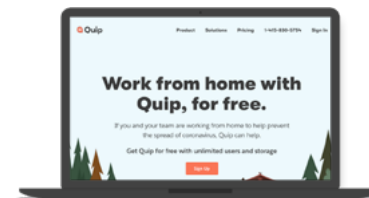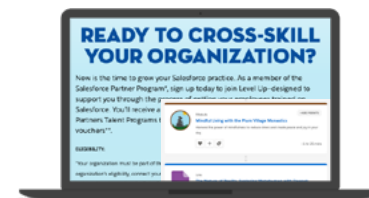Omni-channel workspace for case management

Employee resource groups (ERGs)

Engaging Customers, Partners, and Suppliers

To enable companies to connect with their customers and serve their needs during the crisis, Salesforce Customer 360 provides a single, integrated CRM platform so all your departments have a single, shared view of every customer, and the ability to deliver powerful experiences.

- Engage buyers using personalized marketing
- Win more customers by getting to know their needs and concerns
- Deliver digital-first shopping experiences customers expect
- Respond faster to customer support issues on any channel
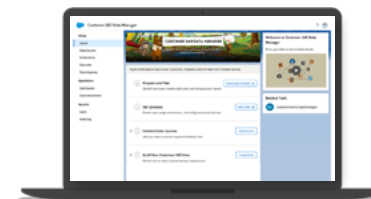- Automate time-consuming tasks by building custom apps

1 | Service Cloud
Enable agents and customers to improve customer experience and resolve issues profitably.

2 | Customer 360 Truth
Get a single source of customer truth to drive better decisions and better engagement.

3 | AppExchange
Help customers respond to the crisis with curated resources.

TACTICS

Virtual events: town halls, meetings, roundtables	Alternate hours and methods of operation	Service bots
CEO letter to customers	Innovation sprints and launches	Evolve reward programs
Customer value scoring	Social listening	Digital communities
Conserving capital	Capture time-phased customer information	Partner communities

Serving Society

To help thousands of organizations become platforms for change in their own communities during COVID-19, Salesforce offers Philanthropy Cloud, Salesforce Nonprofit Success Pack, and the Critical Care Resource Management app.

1 | Salesforce Philanthropy Cloud

Deploy a rapid crisis response solution for employee and customer support.
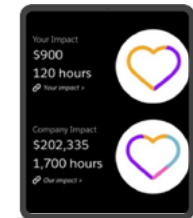
2 | Salesforce Nonprofit Success Pack

Collaborate virtually with this tool to help teams work from home.

3 | Critical Care Resource Management App

Help your workforce learn skills for the future with this online learning platform.

TACTICS

Weekly company all-hands meetings	V2MOM app	Self-service help center for employee crisis needs
Daily employee success emails	Employee and candidate journeys	Omni-channel workspace for case management
Employee surveys	On-demand virtual collaboration training	Employee resource groups (ERGs)
Bot-assisted employee knowledge base (Concierge)	Mental health and mindfulness programs	

Your Response Journey with Salesforce

A lot has changed in the past few months. But business remains the greatest platform for change.
As a leader, you have the power to influence your customers and community in profound new ways.

We hope these strategies to stabilize, reopen, and ultimately grow your business will help you keep customers in the center of everything you do. When you work from that mindset, everything else becomes easier.

Check out these additional tools and resources.

Thank you and stay safe!

Salesforce 1:1 Executive Connect

Connect with a peer executive at Salesforce to share best practices for crisis management, operations, and communications. **Contact your account executive.**

Salesforce Care™

Explore Salesforce's free offerings to respond to COVID-19, including employee and customer support with chatbots, contextual learning, philanthropy, and more.
Learn more >

Work.com Solutions

Access our all-new suite of apps, expertise, and services to help you safely reopen your workplace. This includes contact tracing, crisis response, reskilling, shift management, and more.
Learn more >

COVID-19 V2MOM

Develop a shared vision, values, and prioritized action plan for managing through the crisis using Salesforce's proprietary strategic planning methodology.
Learn more >

Salesforce Virtual Events & Web Series

Join virtual events and web series designed to help business leaders navigate this challenging time.
Learn more >

Leading Through Change How-To Content

Discover thought leadership, tips, and resources to help you manage your business in a time of uncertainty.
Learn more >