NUCLEUS
RESEARCH

SALESFORCE QUIP

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THE BOTTOM LINE

Salesforce Quip provides cloud-based content sharing and collaboration, allowing users to share and annotate a variety of document types, and comment and vote on other's input. Prebuilt templates for project tracking, Kanban, and other sales, marketing, and other business activities – as well as integration with other applications such as Jira and Marketo – help to accelerate adoption and productivity. In analyzing the experiences of Quip customers, Nucleus found moving to Quip increased their productivity by 15 to 20 percent. Further, Nucleus found users were typically able to reduce time spent in meetings by one-third.

OVERVIEW

Quip is a collaboration and productivity tool that is fully integrated into the Salesforce platform, combining the ability to create and edit documents and spreadsheets with other unstructured communication.

Quip is designed to enable groups to rapidly share multiple different types of documents (such as spreadsheets, slides, and project trackers), provide input, comments, and voting; integrate Quip with other applications (such as Jira and Marketo); and accelerate collaboration and decision making.

> **Nucleus found users were typically able to reduce time spent in meetings by one-third.**

Salesforce's early 2018 acquisition of Attic Labs, the creator of Noms, a decentralized database that focuses on collaboration, has the potential to add to the back-end capabilities of the Quip application.

Quip Virtual Private Cloud (VPC) is designed for those businesses in highly regulated industries such as governments, financial services, and health/scientific services that are looking for a managed private cloud collaboration offering with custom deployments. The businesses' IT team defines the custom controls, approvals, and audit functions when deployed as a managed service by Salesforce. Since VPC is delivered on an isolated virtual private cloud, it can offer users customized control over their data and network, including physical location, encryption management, compliance with regulatory requirements, and network access policies.

Recently launched, Quip Slides enables users to collaborate and build team-based slide decks, with real-time co-editing and visual comments. A single version history with continuously updated data assures that presentations are current. The interactive feedback functionality is an interesting concept that theoretically can eliminate physical meeting time – but some teams still prefer face-to-face interactions and will require some "urging" to realize the full benefits of collaborative slide building.

THE BENEFITS

Nucleus found that customers who deployed Quip achieved three primary benefits:

IMPROVED PRODUCTIVITY

- Reduction in the number of physical meetings: Quip delivers teams the ability to collaborate in real-time, the built-in chat function reduces the need for repetitive meetings. A recent case study (Nucleus Research (S114 – *Quip ROI case study – Anonymous* – September 2018) revealed a 60 percent improvement in productivity with an 80 percent reduction in the number of physical meetings.
- Reduction of email activities: Nucleus Research ROI case study *(S78 – Salesforce ROI case study – ICS+ – May 2018)* that included the deployment of Quip showed an average 20 percent reduction of email activity and improved efficiency with data captured into a single source of information.

> **On average, Quip users increased their productivity by 15 to 20 percent.**

INCREASED EFFICIENCIES

- Real-time editing and version accuracy: Users stated that Quip enables them to meet deadlines with its collaborative functionality and work more effectively with other team members on projects and tasks. A healthcare provider noted that its workflow became much cleaner, quicker, and efficient with Quip, avoiding frequent task interruptions and delays.

- Elimination of inefficient email chains for communication.

- Project management: Users can visualize current and past projects for organization and insights.

COST SAVINGS

- Shorten search times by an average of 30 percent driving lower costs to the enterprise. One company reported an average time reduction from 15 minutes to less than 1 minute per search with an average of three searches per day per admin, that translated into annual savings of $3,120 for the administrative staff of four people.

USER PROFILES:

ICS+

ICS+ is a customized audio and video solution for commercial properties such as hospitals, hotels, airports, and educational institutions. The company has been in business for more than ten years, expanding as the demand for custom video and audio installations in commercial properties has increased.

ICS+ got Quip with the Salesforce CRM purchase and took advantage of Salesforce's Premier Success services to accelerate the deployment. ICS+ added additional solutions, including Quip, over the next year. A key benefit achieved from the Quip Integrated collaboration app was the ability for ICS+ to use Salesforce as its customer system of record with all client-related communication and collaboration within the same application.

ICS+ moved from NetSuite, various spreadsheets, and other tools to streamline project management and increase productivity achieving a 942 percent return on investment (ROI) with an average annual benefit of $185,663.

FINANCIAL SERVICES - ANONYMOUS

This company prefers to remain anonymous and deployed Quip for collaboration, document management, and data capture. The company is a global operation that offers warranty solutions with insurance protection plans and service contracts for automobiles, electronic devices, and appliances. It provides underwriting, claims administration, and marketing expertise to manufacturers and distributors, as well as specialty insurance products and services for financial institutions

This company was using a combination of Excel spreadsheets, Confluence, SharePoint, and the Office suite of tools that no longer adequately met the company's needs. Within the first four months of deployment, nearly 35 percent of the staff was using Quip, with additional adoptions each month. This level of participation was considered noteworthy since much of the staff had rejected previous attempts to implement collaboration tools.

> **"Using Quip and Salesforce has made us far more efficient and my staff isn't overwhelmed with a too complex app."**

The deployment of Quip allowed the company to retire an inefficient legacy system and modernize its collaborative efforts. The company was able to reduce the costs of legacy

tools and modernize its workflow processes, reducing the number of meetings and saving the company more than $150,000 annually. Moving to Quip also enabled the enterprise to improve productivity, reduce the inefficiency of frequent meetings by 83 percent, and achieve an average annual benefit of $167,379.

HEALTH CARE CLINIC

One healthcare provider also prefers to remain anonymous due to patient confidentiality concerns. It is a non-profit organization located in northern Nevada, focused on women's and children's health issues. It recently affiliated with a major California research and teaching hospital.

The clinic has nine doctors,14 nurse practitioners, and administrative staff of 35+who were using physical folders, Dropbox, and Excel spreadsheets to track and manage patient data. To be able to participate in women's health care research, the clinic had to update its collaborative content management workflow. Since the research hospital was using Salesforce and Quip, the clinic decided to use Quip, as a logical decision.

Although the deployment is relatively recent, initial adopters have found Quip has enabled them to streamline workflows and significantly reduce the time spent searching for information.

CONCLUSION

Quip is described as simple to implement and easy to use. Quip's integration with the Salesforce product line delivers an effective single-source tool for data collaboration, communication, project management, and real-time file sharing. As companies expand their investment in the digital transformation process, content collaboration tools will continue to gain greater footholds in the industry. The content collaboration space is growing rapidly, and Salesforce is capitalizing on this market with Quip, challenging Microsoft PowerPoint and Google slides, in a competitive market.