Chapter 1

Looking Over Salesforce

In This Chapter

- Solving business challenges
- Extending the value of what you have
- Deciding what Salesforce size fits you

You might not realize it yet, but every time you log in to Salesforce you're accessing an extremely powerful lever of change for you, your group, and your company.

Sounds like a tall order but consider this: What value do you put on your customer relationships? Your partner relationships? If you're a sales rep, it's your livelihood. And if you're in management, you have fewer assets more valuable than your existing partner and customer base. What if you had a tool that could truly help you manage your partners and customers?

Salesforce isn't the first customer relationship management (CRM) system to hit the market, but it's dramatically different. Unlike traditional CRM software, Salesforce is an Internet service. You sign up, log in through a browser, and it's immediately available. Salesforce customers typically say that it's different for three major reasons:

- **Fast:** When you sign on the dotted line, you want your CRM system up yesterday. Traditional CRM software could take more than a year to deploy; compare that to months or even weeks with Salesforce.
- **Easy:** End user adoption is critical to any application, and Salesforce wins the ease-of-use category hands down. You can spend more time putting it to use and less time figuring it out.
- **Effective:** Because it's easy to use and can be customized quickly to meet business needs, customers have proven that it has improved their bottom lines.

With Salesforce, you now have a full suite of services to manage the customer lifecycle. This includes tools to pursue leads, manage accounts, track opportunities, resolve cases, and more. Depending on your team's objectives, you might use all Salesforce tools from day one or just the functionality to address the priorities at hand.

The more you and your team adopt Salesforce into your work, the more information you'll have at your fingertips to deepen customer relationships and improve your overall business.

In this chapter, we reveal the many great things that you can do with Salesforce. Then, we describe how you can extend Salesforce to work with many of the common applications that you already use. Finally, we help you decide which Salesforce edition is right for you just in case you're still evaluating your options.

Using Salesforce to Solve Critical Business Challenges

We could write another book telling you all the great things you can do with Salesforce, but you can get the big picture from this chapter. We focus here on the most common business challenges that we hear from sales, marketing, and support executives — and how Salesforce can overcome them.

Understanding your customer

How can you sell and retain a customer if you don't understand their needs, people, and what account activities and transactions have taken place? With Salesforce, you can track all your important customer data in one place so that you can develop solutions that deliver real value to your customers.

Centralizing contacts under one roof

How much time have you ever wasted tracking down a customer contact or an address that you know exists within the walls of your company? With Salesforce, you can quickly centralize and organize your accounts and contacts so that you can capitalize on that information when you need to.

Expanding the funnel

Inputs and outputs, right? The more leads you generate and pursue, the greater the chance that your revenue will grow. So the big question is, “How do I make the machine work?” With Salesforce, you can plan, manage, measure, and improve lead generation, qualification, and conversion. You can see how much business is generated, sources, and who’s making it happen.

Consolidating your pipeline

Pipeline reports are reports that give companies insight into future sales. Yet we’ve worked with companies where generating the weekly pipeline could take a day of cat herding and guesswork. Reps waste time updating spreadsheets. Managers waste time chasing reps and scrubbing data. Bosses waste time tearing their hair out because the information is old by the time they get it. With Salesforce, you can shorten or eliminate all that. As long as reps manage all their opportunities in Salesforce, managers can generate updated pipeline reports with the click of a button.

Working as a team

How many times have you thought that your own co-workers got in the way of selling? Nine out of ten times, the challenge isn’t people, but standardizing processes and clarifying roles and responsibilities. With Salesforce, you can define teams and processes for sales, marketing, and customer service, so the left hand knows what the right hand is doing. Although Salesforce doesn’t solve corporate alignment issues, you now have the tool that can drive and manage better team collaboration.

Collaborating with your partners

In many industries, selling directly is a thing of the past. To gain leverage and cover more territory, many companies work through partners. With Salesforce, your channel reps can track and associate partners’ deals and get better insight on who their top partners are. Partners now can strengthen their relationships with their vendors by getting more visibility into their joint sales and marketing efforts.

Beating the competition

How much money have you lost to competitors? How many times did you lose a deal only to discover, after the fact, that it went to your arch nemesis? If you know who you're up against, you can probably better position yourself to win the opportunity. With Salesforce, you and your teams can track competition on deals, collect competitive intelligence, and develop action plans to wear down your foes.

Improving customer service

As a sales person, have you ever walked into a customer's office expecting a renewal only to be hit with a landmine because of an unresolved customer issue? And if you work in customer support, how much time do you waste on trying to identify the customer and their entitlements? With Salesforce, you can efficiently capture, manage, and resolve customer issues. By managing cases in Salesforce, sales reps get visibility into the health of their accounts, and service is better informed of sales and account activity.

Accessing anytime, anywhere

Companies are more mobile than ever before. People work from home or on the road. Offices are spread out. You expect to get access to information from multiple devices, easily and reliably. With Salesforce, you can access and manage your critical customer information, at 3 p.m. or 3 a.m., online or offline, in multiple languages, and from multiple devices.

Measuring the business

How can you improve what you can't measure? Simple, huh, and yet how many companies have you worked for that couldn't accurately or reliably measure the business? If you use Salesforce correctly and regularly to manage customers, you have data to make informed decisions. That benefits everyone. If you're a rep, you know what you need to do to get the rewards you want. If you're a manager, you can pinpoint where to get involved to drive your numbers. And with Salesforce's reporting and dashboards, you have easy-to-use tools to measure and analyze your business.

Extending the Value Chain

Salesforce.com understands that most companies already rely on existing tools for parts of their businesses. Such tools might include your e-mail, Office tools, your public Web site, and your intranet. Salesforce.com isn't naïve enough to think people will stop using these tools. In fact, you can readily integrate Salesforce with many of the tools you use today to interact with your customers.

Synchronizing with Outlook

If you work for a company, you probably use Microsoft Outlook every day for common tasks, such as sending e-mails, maintaining your address book, managing your calendar, and jotting down your to do list. With the latest version of Outlook Edition for Salesforce, you can easily capture this information on your Salesforce records (including cases), and synchronize your addresses, contacts, calendar, and to do list bi-directionally at your discretion.

Not every e-mail you send or receive, or every appointment you make needs to be in Salesforce, but you might want to track the important customer ones. By doing this, you and your team can stay up-to-date on e-mail discussions and related activities.

Integrating with your Web site

For many companies, the public Web site is a primary way to communicate information to their customers. You might use your Web site as a channel for visitors to request information or log customer service issues. With Salesforce, you can capture leads and cases directly from your Web site and route them directly into Salesforce and assign them to the right reps. And with Salesforce's assignment rules, you can make sure that incoming leads or cases get to the right reps in a timely manner. With minimal effort, you can even offer self-service options in the form of a public knowledge base or a private portal, enabling customers to help themselves.

Connecting to other Web sites

As part of your job, you might regularly use Web sites for tasks like researching potential customers, driving directions, and getting the inside scoop on your competition. With the help of your system administrator, your company can build custom links in Salesforce that can connect you directly with the relevant pages of important sites. Accessing your intranet; populating a Web form to provision a demo; creating and propagating a Salesforce record — all these are within reach. And all this means time saved for you.

Integrating with other applications

Your company might have other applications with critical customer data — financial and enterprise resource planning (ERP) applications are just a few examples. Many applications provide unique and indispensable value to your organization. Your company isn't going to retire them just because you're using Salesforce. But based on company objectives, those applications might need to integrate with Salesforce. With Salesforce's open architecture, your company can make this happen with the right technical assistance.

Managing other business processes

When you log in to Salesforce, you see several tabs, grouped into tabsets called *apps*. Salesforce.com prioritized the development of each of those tabs based on core CRM functions. But depending on your business needs, you might require apps with different functionality for teams that may or may not have anything related to sales, marketing, or service and support. Submitting expenses and requesting vacation time are just a few examples of what any employee might need. With salesforce.com's AppExchange platform, your company can now easily build or download these custom apps to fit your specific business needs. A company can now use Salesforce for uses above and beyond CRM, and ultimately manage a significant, if not complete, portion of their business online.

Deciding Which Edition Is Best for You

If you already use Salesforce, this topic might be a moot point. At the very least, you'll know which version of Salesforce you have.

Salesforce.com has five versions of its service. All versions have the same consistent look and feel, but each varies by feature, functionality, and pricing. (If you're considering using Salesforce, you should consult with an account executive for more details.)

- **Personal Edition:** Basic account, contact, and opportunity management for one person.
- **Team Edition:** Account, contact, and opportunity management for teams of five users or less.
- **Professional Edition:** Full-powered CRM without complexity for any size organization.
- **Enterprise Edition:** Flexible CRM for more complex organizations.
- **Unlimited Edition:** Extending CRM for organizations that want to run multiple business applications using the Salesforce platform.

Most companies tend to make a decision between Professional and Enterprise Edition. Budget might be an issue, but the decision usually boils down to core business needs. Consider these questions:

Does your company . . .

- Have different groups with distinct sales processes, customers, and products?
- Sell multiple products and need visibility into them?
- Need scheduling on opportunities to estimate revenue recognition?
- Plan to integrate Salesforce with other applications?
- Require complex data migration into Salesforce?
- Need greater control over user profiles and their permissions?
- Sell in defined teams with specific roles?
- Require workflow to further automate processes?

If the answer to any of these questions is a definitive *Yes,* your company should probably start with evaluating Enterprise Edition. The extent of your company's needs above will determine if Unlimited Edition is the optimal choice.

Whichever edition you choose, the good news is that every edition of Salesforce is rich with features that can help companies of every size address their business challenges. You can choose a more basic edition today and upgrade later if you can identify and prioritize the most important functionality that your team needs on day one. Because Salesforce is an Internet-based service, upgrading is handled immediately and behind the scenes, so you can focus on the business processes that drive the need for new functionality. And when salesforce.com rolls out new releases of its service, product enhancements are available to the different editions wherever relevant.