Chapter 1

Looking Over Salesforce

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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 than the other CRM systems you might have used (spreadsheets and sticky notes count as a system, too!). Unlike traditional CRM software, Salesforce is an Internet service. You sign up and log in through a browser, and it's immediately available. Salesforce customers typically say that it's unique for three major reasons:

- **Fast:** When you sign on the dotted line, you want your CRM system up yesterday. Traditional CRM software can 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. These services include tools to pursue leads, manage accounts, track opportunities, resolve cases, and more. Depending on your team's objectives, you might use all Salesforce's tools from day one, or you might focus on just the functionality to address the priorities at hand.

The more you and your team adopt Salesforce into your work, the more information you 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 to and retain customers 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 you or your team generates, the sources of that business, and who in your team is making it happen.

Consolidating your pipeline

Pipeline reports give companies insight into future sales. Yet we've worked with companies in which 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. By using 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 customers 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 can stay well 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 Salesforce's reporting and dashboards give you 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 Connect for Microsoft Outlook, 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.

You don't need to archive every e-mail you send or receive, or every appointment you make, in Salesforce, but you might want to track the important customer ones. By noting the relevant milestones, you and your team can stay up-to-date on e-mail discussions and related activities.

TIP

If you use Lotus Notes, you have an e-mail synchronization solution, too. Like Connect for Outlook, Connect for Lotus Notes allows you to work more efficiently within Salesforce and your e-mail system.

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. When you use Salesforce, you can capture leads and cases directly from your Web site, route them directly into Salesforce, and assign them to the right reps. And Salesforce's assignment rules 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 such as researching potential customers, getting 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 tasks are within reach. And all this means time saved for you.

Integrating with other applications

Your company might have other applications that contain 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. Because of Salesforce's open architecture, your company can integrate applications if you have 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 that have 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 Force.com 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 more than CRM and ultimately manage a significant, if not complete, portion of its 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 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, consult with an account executive for more details about edition differences, pricing, and upgrade paths):

- **Personal Edition:** Basic account, contact, and opportunity management for one person.
- **Group Edition:** Basic CRM for teams of up to five users.
- **Professional Edition:** Thorough CRM for any size organization that's starting to nail down processes. Some optional features come at extra cost.
- **Enterprise Edition:** More functionality for more complex organizations. This edition provides more value than if you pay extra for certain features in more basic editions.
- **Unlimited Edition:** A lot more customization capabilities for extending Salesforce to other business uses. You need a dedicated (and usually technical) administrator to take advantage of all the options that this edition delivers.

Professional or Enterprise Edition?

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 evaluate Enterprise Edition. The extent of your company's needs in the preceding list determines whether Unlimited Edition is the optimal choice. Be sure to prioritize what you need today and figure out what can wait.

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, as needed. 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, it provides product enhancements for the different editions wherever relevant.