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# What is Salesforce CRM & How Does Salesforce Work: Understanding Salesforce

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# SALESFORCE

## What is Salesforce CRM & How Does Salesforce Work: Understanding Salesforce

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Salesforce is termed as the most comprehensive customer relationship management (CRM) tool. It is a one-of-a-kind CRM System that helps you redefine your business processes. But, what does Salesforce do exactly? How can it benefit your business? Which is better [Salesforce or Zoho](#)? If you are searching for the answers to these questions, then you've come to the right place.

Understanding Salesforce and how does Salesforce work becomes easy once you know what is Salesforce CRM, what is Salesforce used for and the different products it offers. In the below article, we've explained all that you need to know about Salesforce to help you make an informed choice.

Read the reasons as to why use Salesforce for your business.

< **CRM** with what is a Salesforce software and look at its brief history!

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## A] What is Salesforce CRM?

In simple terms, Salesforce CRM is a cloud-based software that helps organizations to effectively streamline their sales and marketing operations. Today, Salesforce is the #1 customer relationship management (CRM) platform in the world. It also offers organizations easy access to web-based software over the internet.

[Salesforce was founded](#) by Marc Benioff in 1999 as a Software as a Service (SaaS) company. The aim was to make the purchase of software easier for business organizations without the cost of setup fees, maintenance and other constant upgrades. This has helped businesses save millions of dollars that come with software installation and managing the hardware infrastructure.

[Salesforce implementation](#) is quite simple and straightforward. Plus, with a shift to Cloud Computing, the Salesforce CRM platform has managed to deliver exceptional services and products at a fraction of the cost. This has helped boost its popularity to newer heights. The products it offers include Sales Cloud, Marketing Cloud, Service Cloud, Analytics Cloud, Commerce Cloud, App Cloud, IoT Cloud, Financial Services Cloud, Health Cloud, Chatter and Force.com.

## B] What Services And Products Are Offered By Salesforce?

Now that we've discussed what is Salesforce CRM, let's look at the services it provides. Owing to the wide range of products, companies have the option of choosing a Salesforce system based on their business requirements. Salesforce offers the best [CRM software solutions](#). This makes it an all-in-one platform for CRM applications like sales, marketing, service and more.

If you want to learn about what can you do with Salesforce, then, here, is a brief [Salesforce CRM overview](#) on a few of its products and services.

**1. Salesforce Sales Cloud:** From managing your organization's sales to helping you close more deals faster to enabling you to make quicker decisions, the [Salesforce Sales Cloud CRM](#) is created especially for the Sales team. The Salesforce Sales Cloud features include contact management, lead management, sales forecasting, reports & dashboards, sales performance management among others.

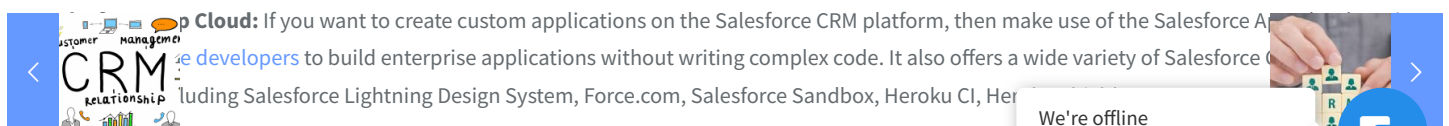
**2. Salesforce Service Cloud:** This Salesforce CRM platform is for the Customer Service and Support Team. If you want to offer personalized service and faster support to your customers, then this Salesforce platform can help you. The best part about this application is that it offers multi-channel support. Thus, you can now easily reach your customers via their preferred channels, i.e. phone, email, social media, web chat etc.

The key features of Salesforce Service Cloud are; agent console (a unified platform that stores all customer data, resulting in quicker response time), live agent (for 24/7 real-time online communication using web chat), knowledge base and service cloud community.

**3. Salesforce Marketing Cloud:** The best Salesforce service to increase customer engagement. The Salesforce Marketing Cloud application offers you a 360-degree view of your customers. As a unique and powerful digital marketing platform, this service helps you create personalized experiences throughout the customers' journey and across all channels – commerce, sales, service, marketing etc.

Some of the features included are email marketing, contact builder, content builder, social studio, data studio, journey builder and more. If you are searching for the best [CRM for small business](#) that helps you keep pace with the evolving market, then this Salesforce CRM service is what you need.

**4. Salesforce Analytics Cloud:** This powerful Salesforce program can be integrated with all other Salesforce Cloud products. As a new Business Intelligence tool from Salesforce on the Wave platform, the Salesforce Analytics Cloud enables you to easily access data from all other sources. It is optimized for data visualization and mobile access. Best part, it offers a complete view of aggregated data through pictorial representations alongside predictive insights. These data-driven metrics can help you take faster actions to improve your overall sales performance.



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6. **Salesforce IoT Cloud:** This Salesforce CRM platform is ideal for storing and processing IoT data. It uses the Thunder engine to process massive volumes of data generated from websites, devices, applications, customers & partners and provides you with real-time responses which will enable you to offer better customer service.
7. **Salesforce Health Cloud:** Healthcare providers can now offer personalised care with the Salesforce Health Cloud system. As a patient management software, it offers a 360-degree view of your patients by recording critical information that can be accessed from anywhere at any time. This leads to better patient experiences, faster responses, and makes it easier for your team to automate tasks such as patient registration, follow-ups, reminders, etc.

## C] How Does Salesforce Work?

Salesforce is the first company to develop cloud-based CRM software. It uses cloud-computing to distribute software model online making it affordable for companies to purchase a CRM system for their business. The [Salesforce CRM platform](#) has enabled companies to function more effectively, improve their interaction with their customers, manage data more efficiently and improve employee-customer engagement. This has led to an increase in the profitability index, with [recent statistics](#) stating that ‘CRM offers an average return of \$5.60 for every \$1 spent.’

Apart from helping companies organize and manage their customer interactions and potential prospects, the Salesforce system also provides a lot of features enabling employees to offer enhanced customer services in various areas. With specific Cloud products (sales, marketing, commerce) for each service, Salesforce has made collaboration simple & effortless at all stages. This includes the sales pipeline, marketing campaigns, connecting with customers & resolving issues etc.

Best part, the Salesforce CRM has helped make manual data entry a thing of the past by offering automated solutions. Analysing huge amounts of data and identifying opportunities have become easier. Also, with its predictive analysis and accurate forecasting, employees can now convert a qualifying lead into a sale.


## #The Standard Objects in Salesforce

Mentioned below are a few standard objects in Salesforce. For a complete list, [go here](#).

Campaign	This represents a marketing campaign and monitors & tracks direct mail promotion, mass emailing, webinar, etc.
Lead	This represents individual or companies who are interested in the product/services.
Account	This represents an individual account that your organization is handling or interacting with. This could include customers, partner companies, etc.
Contact	This represents an individual person associated with an account. This tracks their contact details & any other relevant personal details eg birthdays.
Opportunity	This represents a possible deal with an existing or a new customer. This enables tracking an organization’s sales cycle through its various stages.
Product	This represents the various products that an organization sells to its customers.
Forecast	This represents an estimation of the organization’s quarterly, monthly & annual revenue.
Case	This includes a description of any issue that a customer has reported.
Activities	Activities comprise of tasks & events. Tasks are the to-dos for any individual or team. Events are meetings/calls scheduled with prospects, customer or internal team members.


## D] Why Use Salesforce CRM?

There are many [ways CRM can help accelerate your business growth](#). The Salesforce CRM platform, in particular, offers an enhanced level of customer relationship management through its simple and intuitive interface. It is easily customizable and scalable. This ensures that it can be tweaked as per an organizations’ needs and is future ready. Moreover, most companies that use Salesforce find it extremely easy to use after implementation. This leads to seamless adoption by all in the organization.



CRM Relationship Management

Is Salesforce for your business? Here are a few reasons:



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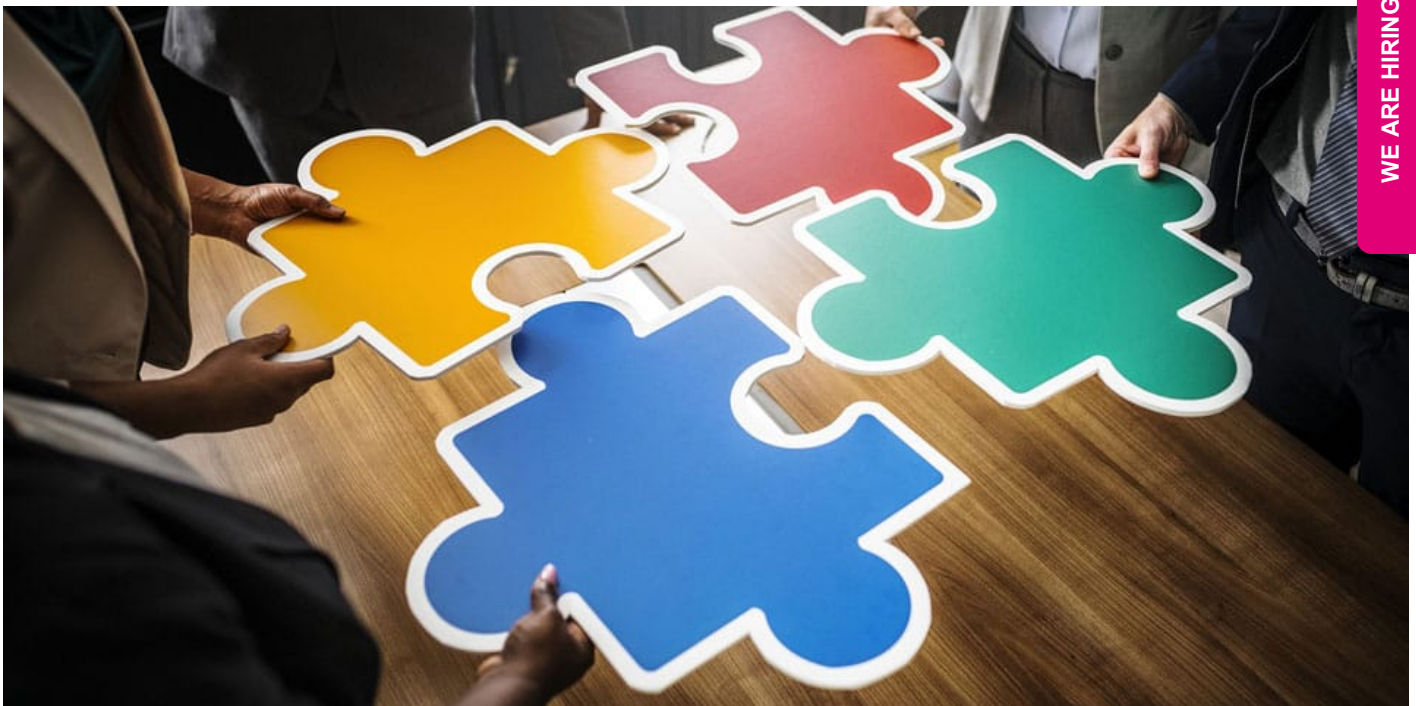


**1. Helps Automate Everyday Tasks:** Salesforce CRM helps you to effectively automate repetitive tasks. This helps reduce workload, boosts efficiency and minimize the risk of errors. Some of the everyday tasks that can be automated are emails, voicemails, call logging, lead prioritization, scheduling appointments etc.

**2. Makes Tracking Customer Data Easier:** Since all the organization's data is stored in a single centralized unit, it makes tracking customer life cycle easy. This data can then be used for personalization, which will help improve customer satisfaction. Furthermore, it can also help you re-engage with your inactive subscribers, increasing customer retention.

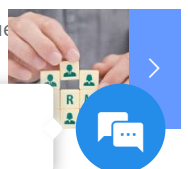


**3. Improves Internal Collaboration & Communication:** When customer data is easily available, it helps boost internal collaboration and communication between the teams. As all information is readily available, it leads to quicker response time. One can also easily identify opportunities to discuss leads, follow sales activities in real-time and track timelines. All this helps boost productivity, leading to growth in revenue.



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**4. Enhances Customer Service:** The direct result of all the above – automation, easy tracking of customer data and improve internal collaboration – is enhanced customer service. With the Salesforce CRM platform, your employees can find quick resolutions to any customer query and increase brand loyalty.



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**5. Efficient Reporting:** Salesforce allows for easy analysing of data which leads to better and efficient reporting. It has in-built tools that allow you to easily generate various reports – be it lead status report, total sales report etc. This gives you an accurate picture of the revenue earned and also highlights areas that need improvement.



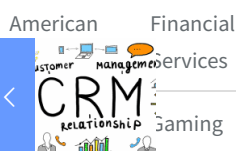
## #Which Companies Use Salesforce?

According to the [data collected](#), 99 of FORTUNE 100 brands partner with Salesforce.

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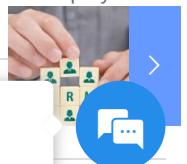
Company Industry Case



American Express began using Salesforce Sales Cloud in 2010. This enabled them to connect thousands of employees across locations, time zones and organizations.

Activision uses Marketing Cloud to monitor social media leads for their product platform to follow up on those leads.

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Company	Industry	Case
Obama for America	Government	From sending personalized emails to users to keeping real-time tabs on what nation wants and their opinions, the Salesforce Service Cloud platform has immensely helped the Staff of Obama for America.
Xtreme Lashes	Beauty	Salesforce enabled them to manage sales & customer service and made native apps and addons integration easy, which helped boost productivity.
Wells Fargo	Financial Services	This company uses the CRM platform to keep all its services in sync, including banking, investing, credit cards, mortgages etc.

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\*Source: <https://www.salesforce.com/crm/examples/>

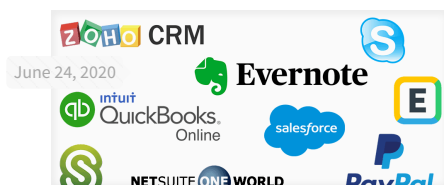
## #Conclusion

Be it affordable cloud-based CRM solutions or the wide range of CRM products, Salesforce is undoubtedly a global market leader in the CRM industry. It caters to all – small, mid-sized as well as large enterprises. Salesforce CRM packages include countless essential features. In addition, it is also easy to set-up and as a scalable platform helps in business growth. Thus, now that you know what is Salesforce CRM, its various products, what can Salesforce do and its many benefits, we hope you make the right decision. But, if you still need further clarifications or have queries regarding the Salesforce system, then as [Salesforce consultants](#), we can help you!

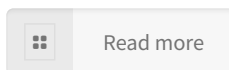


Zarna Naik

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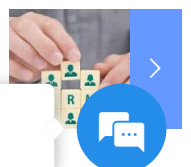


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