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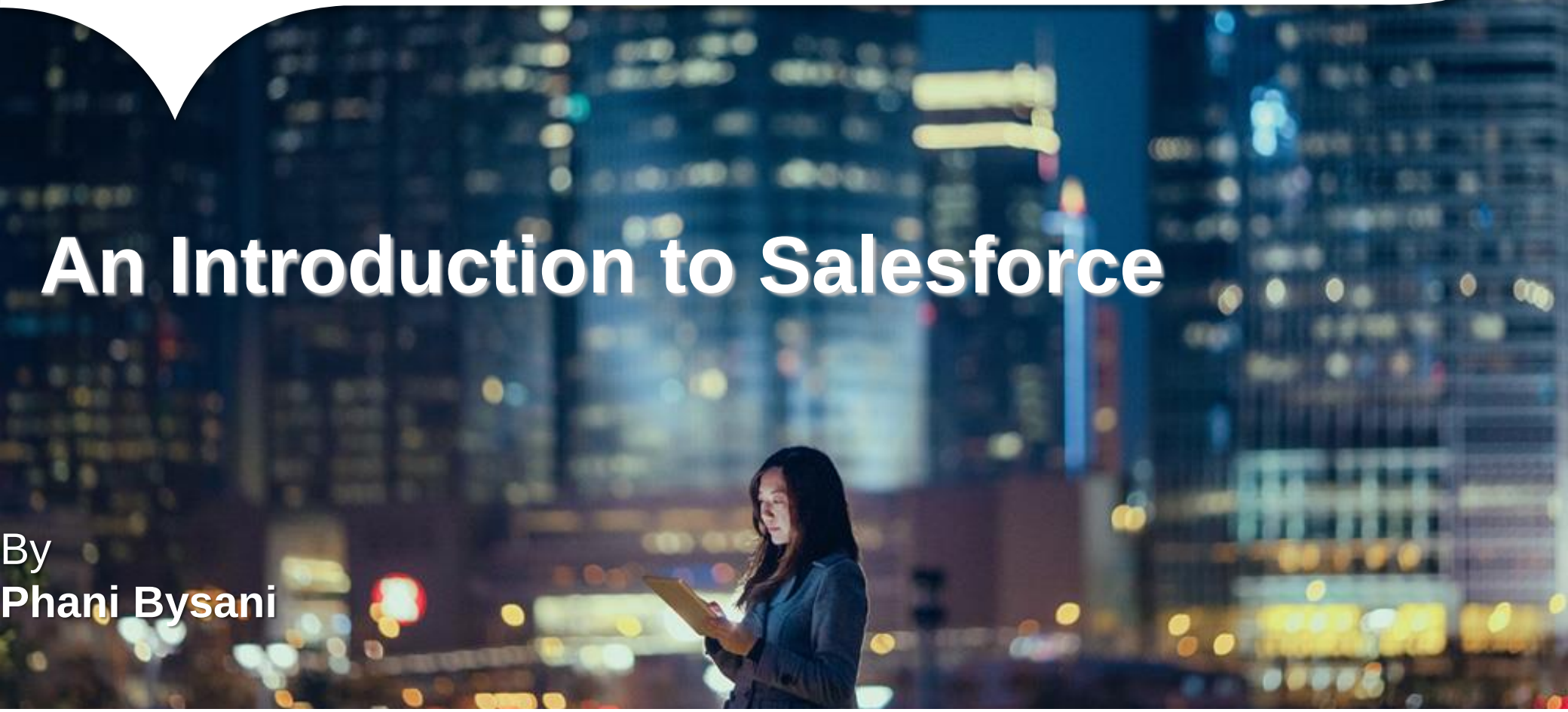
salesforce



An Introduction to Salesforce

By
Phani Bysani

People matter, results count.

Agenda

- CRM Basics
- Introduction to Salesforce
- Salesforce Suite of Products
  - The Sales Cloud
  - The Service Cloud
  - Marketing Cloud
  - Analytics Cloud
  - Force.com Cloud platform
- Salesforce Integration Architecture – Case Studies

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CRM basics

CRM Overview

- **C**ustomer **R**elationship **M**anagement
- Broadly defined, CRM is a strategy for managing a **company's interactions with clients and sales prospects** and ensuring the 'Connect' sustains throughout the relation.
- This technology allows you to manage relationships with your customers and prospects and track data related to all of your interactions. It also helps teams collaborate, both internally and externally, gather insights from social media, track important metrics, and communicate via email, phone, social, and other channels.
- **Purpose**:
    - Retain existing clients
    - Energize dormant accounts / clients
    - Find new clients
- **Examples**
    - New launch offers from your beloved cosmetics brand
    - Supermarkets / Retail brands giving out specific deals to customers

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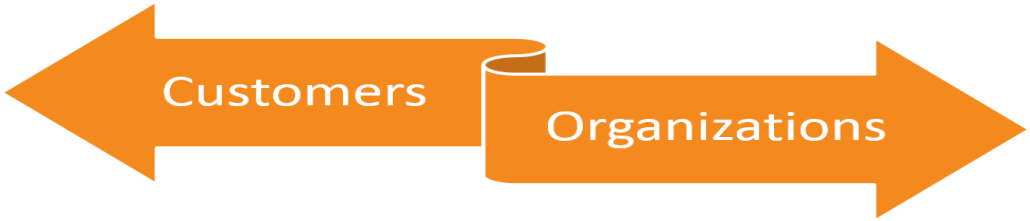
Importance of CRM

Sales team always had data on what is selling and who is buying. Then **why is it that CRM has become so important in the current world?**
Lack of timely data and fragmented systems meant unused data
Companies were worried about getting their house in order



- Quick and specific response
- Flexible resolutions
- No rigidity
- Less Bureaucracy
- Easy information availability

- Higher revenues through lesser personnel
- Reduced maintenance (cost & time)
- Activities targeted at revenue generation

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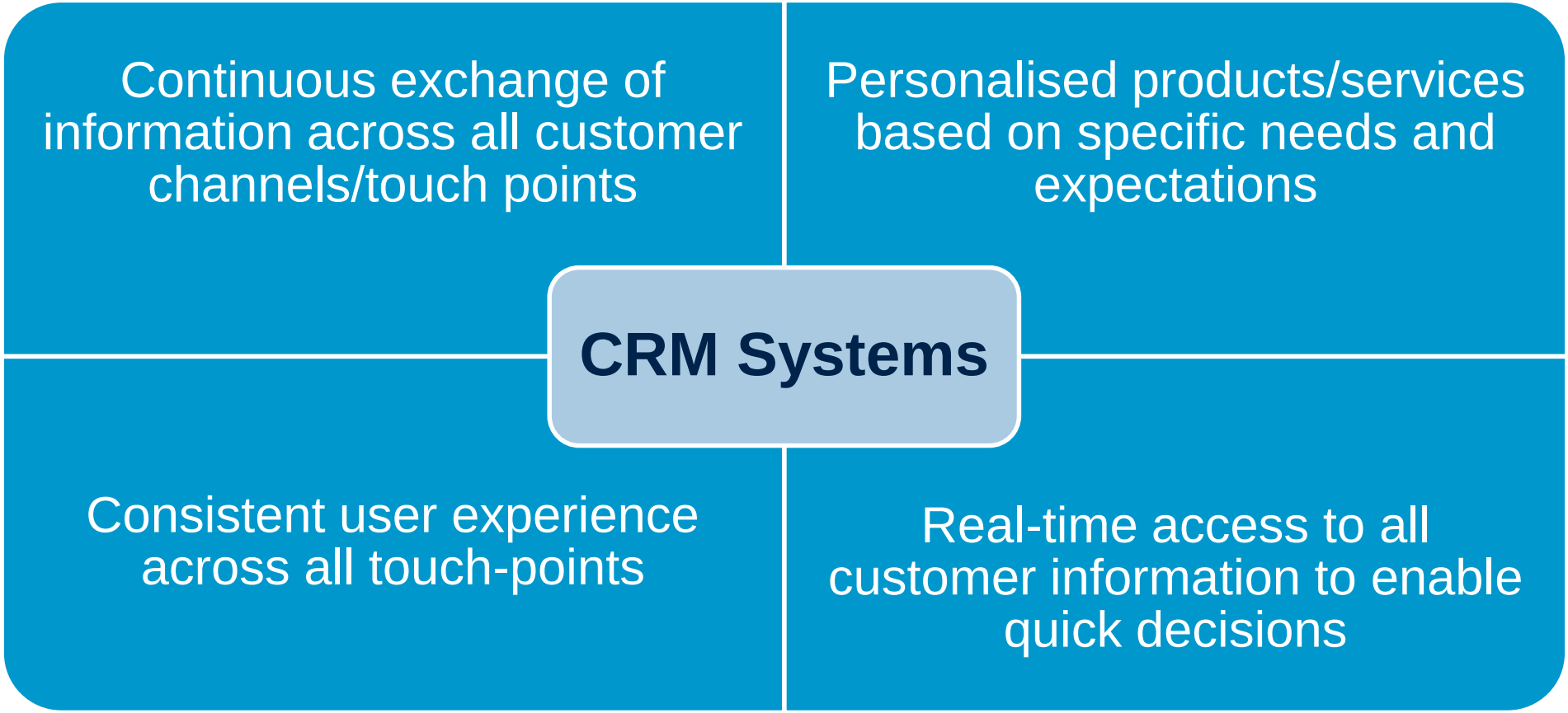
Importance of CRM



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Types of CRM

- **On Premise / Traditional systems**
  - Siebel,
  - SAP CRM
  - Microsoft Dynamics

On Demand / Cloud Based Systems

- Salesforce,
- Microsoft Dynamics,
- SAP C4C,
- Oracle CRM on-demand

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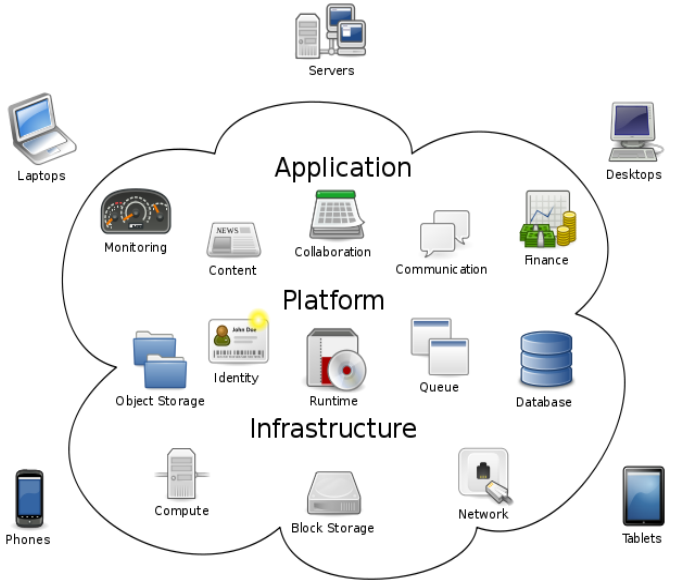
Cloud computing refers to Internet-based computing

Involves shared resources, software and information provided via computers, mobiles

The term cloud is used to signify the Internet

Multi-Tenant: No Capital Expenditure
Pay per Use: Predictable Operating Costs
Scalable: Scales With You



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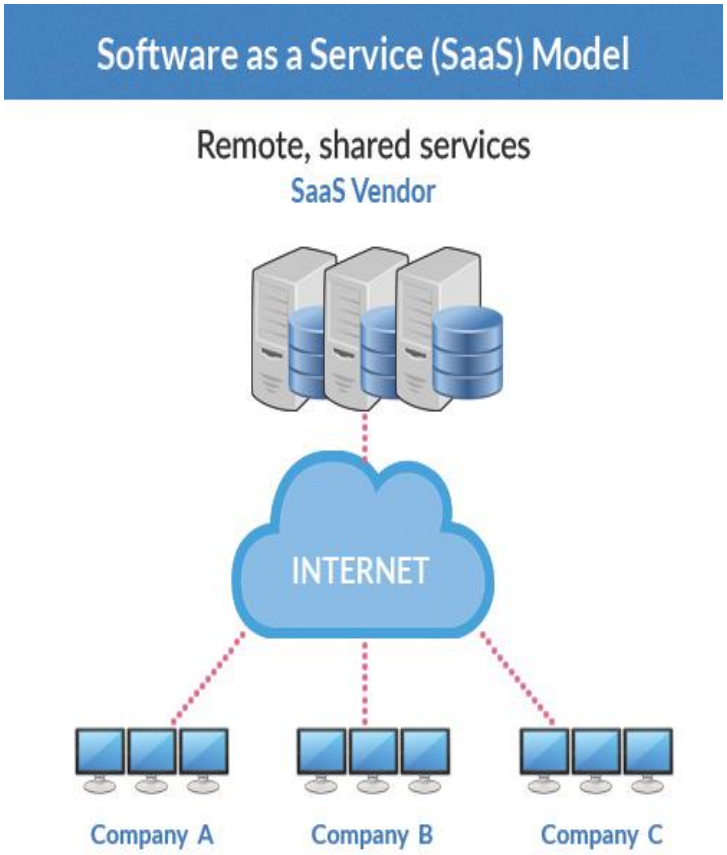
Software as a Service - SaaS

SaaS (Software as a service) is a model for software delivery

- The entire service is managed centrally by the software company Inc. infrastructure, network, security etc.
- Interested individuals and companies are allowed to **"Rent"** it rather than "Own " it
- **Requires access through a Network** (usually Internet but may also be an intranet)
- Replicates **a One-to-Many model** (single instance, multi-tenant architecture)
- **No need for clients to worry about patch upgrades** and version management as all features are updated automatically



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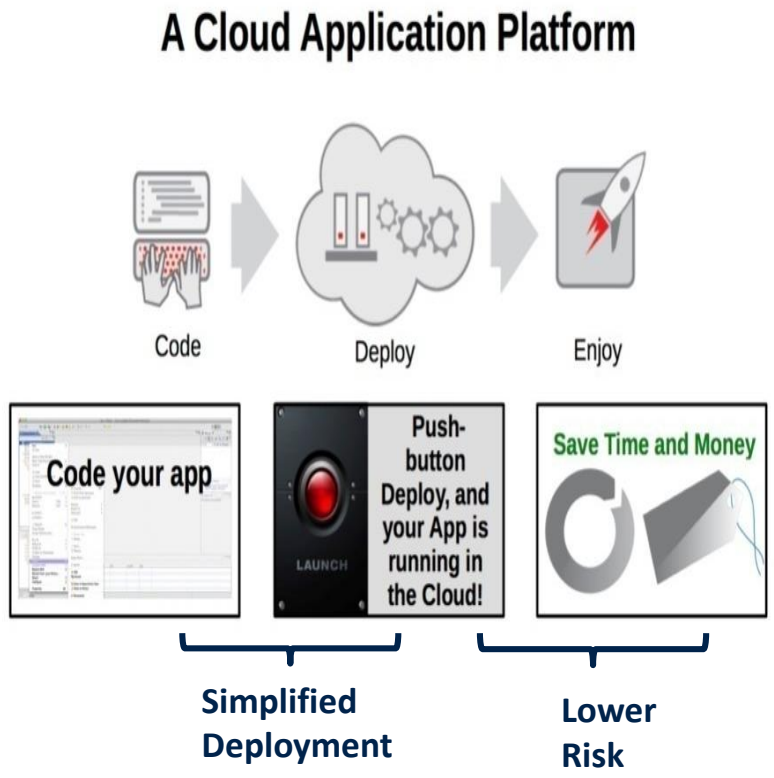
Platform as a Service - PaaS

- **Cloud computing has evolved to include platforms for building and running custom applications, a concept known as "Platform as a Service" (or PaaS)**

- **Types of PaaS Solutions :**
  - Social Application Platforms
  - Web Application Platforms
  - Business Platforms (e.g. Force.com)



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About Salesforce

What is Salesforce

- Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

- Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

- But standard products and features are only the beginning. Our platform allows you to customize and personalize the experience for your customers, partners, and employees and easily extend beyond out-of-the-box functionality.

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Salesforce Suite of Products and typical Sales Cloud license model

Sales Cloud Pricing

Sell faster and smarter with any of our fully customizable CRM editions.

Lightning Essentials	Lightning Professional	Lightning Enterprise	Lightning Unlimited
		MOST POPULAR	
Out-of-the-box CRM for up to 5 users	Complete CRM for any size team	Deeply customizable sales CRM for your business	Unlimited CRM power and support
$25	$75	$150	$300
USD/user/month* (billed annually)	USD/user/month* (billed annually)	USD/user/month* (billed annually)	USD/user/month* (billed annually)
TRY FOR FREE	TRY FOR FREE	TRY FOR FREE	TRY FOR FREE

https://www.salesforce.com/products/

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Salesforce Suite of Products

Sale Cloud: Account Management, Contact Management, Opportunity Management, Lead Management, Campaign Management, Sales Collaboration, Sales Forecasting, SteelBrick CPQ, Activity Management, Mobile, Email integration, Reports & Dashboards

Marketing Cloud: ExactTarget Email Marketing (B2C), Customer Journeys, Analytics, Radian6 Social Studio, BuddyMedia

Service Cloud: Case Management, Omni-Channel Service, Knowledge Management, CTI, Live Agent (chat), Service Contracts, SLA Management, Mobile, Field Service Management, Reports & Dashboards

Community Cloud: Unified Platform, Branding/Customization, Templates, Business Integration, Social Feed, Reputation, Social Intelligence, Mobile, Reports & Dashboards

Analytics Cloud: Wave Analytics Apps (pre-built), Wave Analytics Platform (build your own)

App Cloud: Force.com Platform (Declarative & Programmatic) for custom apps, Heroku, Platform Encryption, Event Monitoring, Data Archival & Retention

Other Products: Pardot (B2B), Data.com, Desk.com

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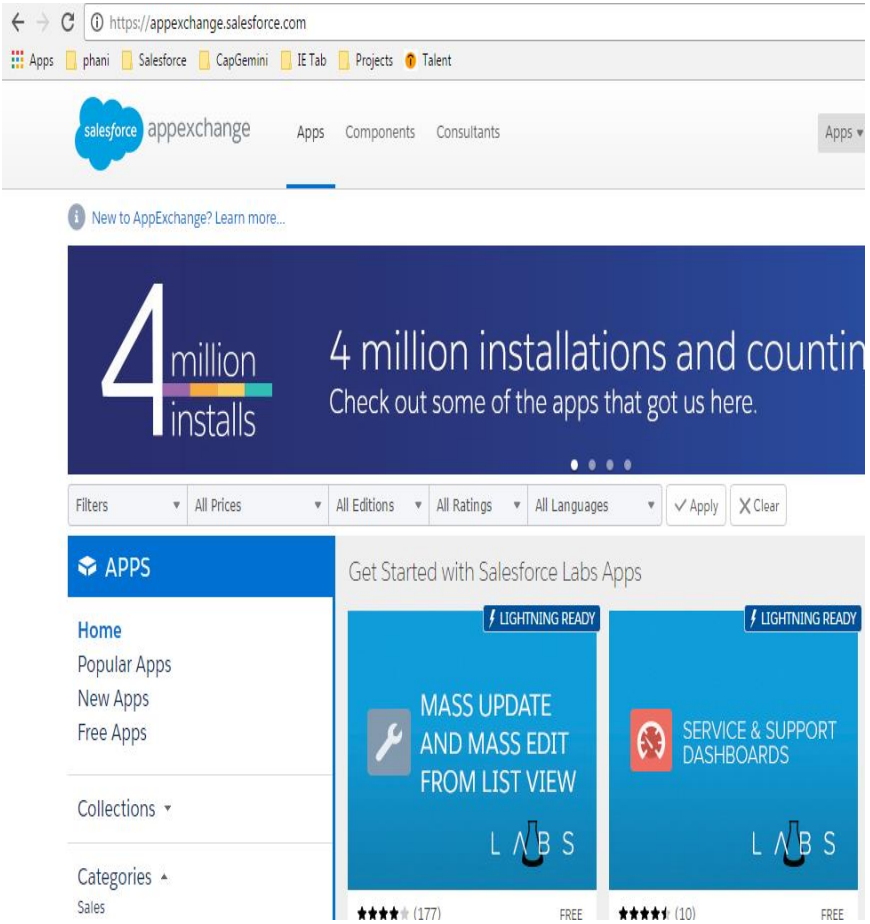
Characteristics of Saleforce Solutions

- Salesforce is a SaaS product, but provides ability to extend and customize the application
- Declarative (no development) coding allows for quick functionality deployment
- Salesforce (system design) organization structures are foundational to the products and must be strategically and architecturally considered as part of any product purchase or deployment
- Salesforce has a Platform as a Service solution – Force.com were other vendors can build proprietary solutions – AppExchange
- Many of the AppExchange applications are very specialized for targeted/simple use cases – department or business unit vs Global



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Salesforce ecosystem

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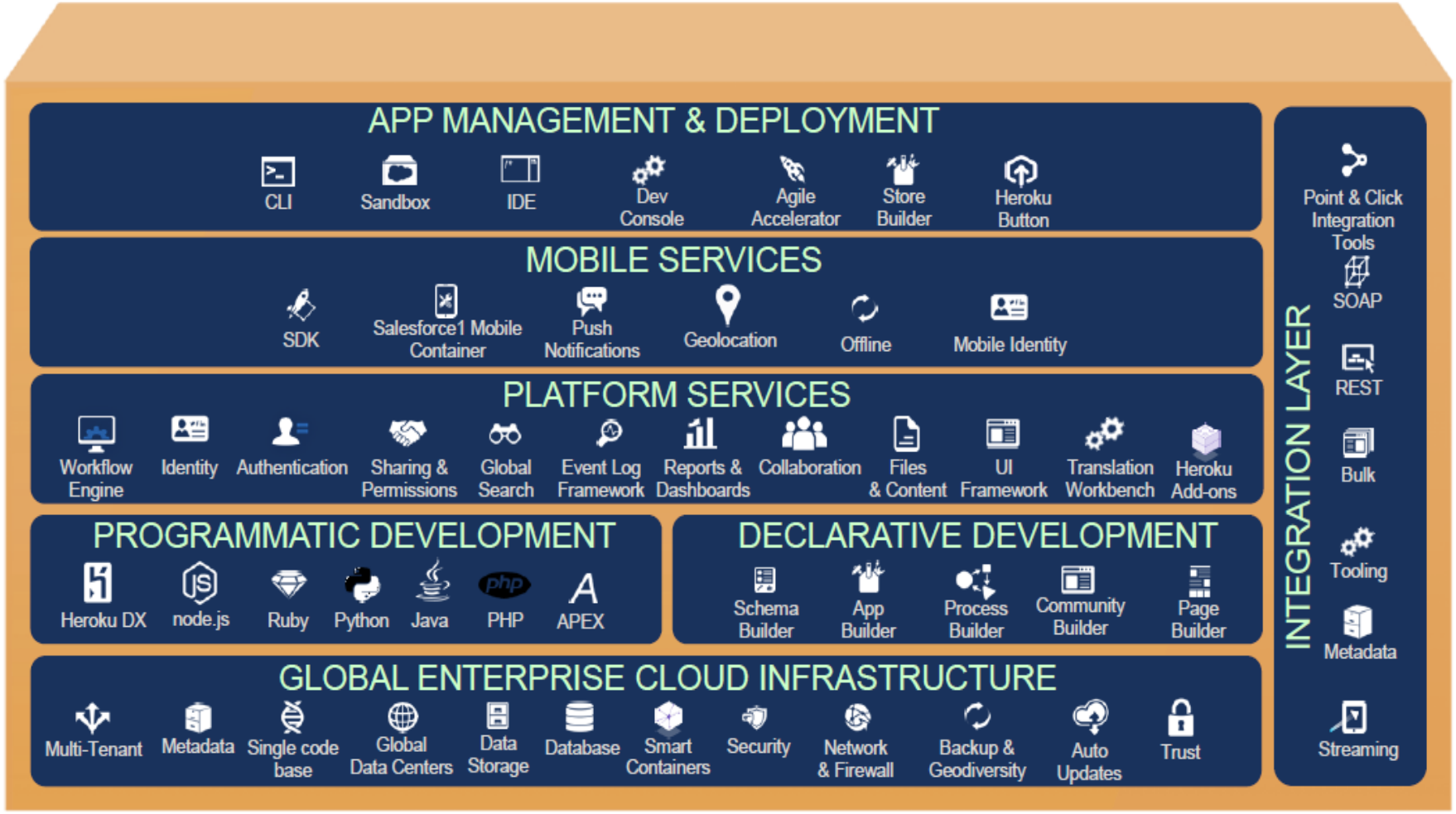
Salesforce Platform Capabilities



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Overview of Salesforce Products

The Sales Cloud

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The Sales Cloud

- The Sales Cloud helps both sales reps and managers do what they need to do: sell. Plus, get the next generation of collaboration tools with Salesforce Chatter.
- Sales reps will have all the tools they need to be more productive, more collaborative, and sell more effectively. The result: stronger connections with customers, higher win rates, and more closed deals.

- Trailhead:
- https://trailhead.salesforce.com/modules/sales-cloud-platform-quick-look

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The Sales Cloud ..Tools

- **Accounts & contacts** – Maximize sales rep productivity with a 360-degree view of each customer for deep knowledge of every account and contact.
- **Marketing & leads** – See which of your marketing efforts leads to the most sales with a single system for managing and tracking multi-channel marketing campaigns from lead to close.
- **Opportunities & quotes** – Have a single place for updating deal information, recording customer interactions, tracking competitors, and creating quotes. Get at-a-glance visibility on that critical deal.
- **Visual process manager** – Streamline pricing approvals to speed up your deal cycles and automate follow-up tasks to boost sales effectiveness. Now, you'rein business.
- **Email & productivity** – Remove the barriers to CRM by combining the desktop apps your reps already use in one spot. The Sales Cloud works seamlessly with Microsoft Office, Lotus Notes, and Google Apps.
- **Integrated content library** – Give your reps instant, easy access to the best sales presentations and collateral. Share what works with the team and keep reps on message and selling with confidence.

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The Sales Cloud ..Tools

- **Analytics** – Get a comprehensive, real-time view of your business. Managers, executives, and reps are only a few clicks away from the insight needed to make smart business decisions and accurately estimate future sales.
- **Chatter** – Collaborate on what matters most to you at work. Get updates on people, data, and documents through real-time feeds, where all the information you need is pushed straight to you.
- **AppExchange** – Extend the Sales Cloud to financial services, human resources, or analytics. Browse among hundreds of applications on the AppExchange,salesforce.com's popular marketplace of cloud computing apps. Try them, and then deploy when you're ready.
- **Partners –** Get unparalleled, real-time visibility across all channels. Share information and collaborate instantly with partners on contacts, deals, opportunities, and products.

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The Service Cloud

- Service Cloud customer service software gives you faster, smarter customer support. It refers to the “service” module in salesforce.com. It includes accounts, contacts, cases and solutions. It also has features like public knowledge base, web-to-case, call center and self service portal as well as customer service automation.

- Some of the related features are:
  - Deliver 24/7 customer service
  - Always-on customer service.
  - Personalized service.
  - Multichannel support.
  - Intelligent customer service.
  - Faster support.

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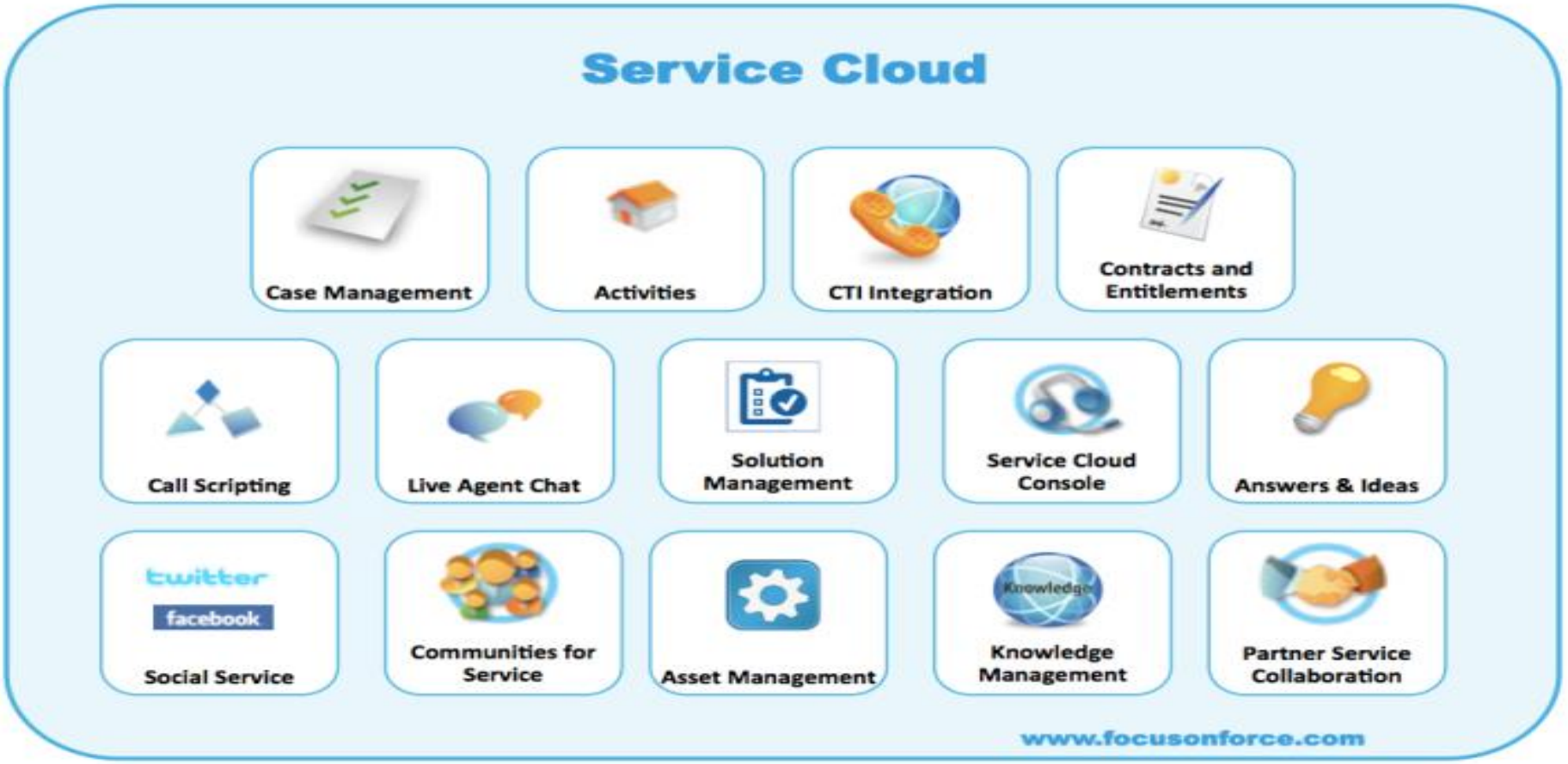
Service Cloud Overview



https://trailhead.salesforce.com/en/modules/service_basics/units/service_basics_intro

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Marketing Cloud Overview

- Salesforce.com offers the Marketing Cloud allowing for businesses to automate social media marketing in a way that helps businesses listen to the chatter about their products and services, educate them on how to use their products and services more effectively, engage customers and encourage sharing of positive information.

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Einstein Analytics

Einstein Analytics revolutionizes the way you understand and refine new strategies around your business. Unlike traditional BI software, Analytics Cloud leverages cloud and mobile technology to deliver more powerful, more secure data faster, with optimized coverage. It is designed so that everyone can get insights on any device and connect any data, from anywhere.

Some of the related features are:

- Every business user can find and share answers instantly.
- Run your business from anywhere.
- Salesforce cloud speed and trust.

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Salesforce Platform

Salesforce Platform is the app development platform that extends your CRM's reach and functionality.

Force.com is a platform as a service (PaaS) that allows developers to create multitenant add-on applications that integrate into the main Salesforce.com application. Force.com applications are hosted on Salesforce.com's infrastructure.

Force.com applications are built using Apex.

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Salesforce Lightning

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Salesforce Lightning

Get a completely re-imagined user interface with a seamless experience across all your devices. Build apps visually with Lightning App Builder and Lightning Components. Get tools and best practices with the Lightning Design System.

Lightning Experience:

The Lightning Experience brings a re-imagined consumer-like experience that is modern, efficient and smart to Salesforce users across every device (desktop, tablet and mobile). Relevant information is surfaced for each screen, streamlining processes and making workflows more intuitive.

Lightning App Builder and Lightning Components:

Instead of building applications from scratch, what if you could use a drag-and-drop library of easily configurable components? With the Lightning App Builder and the Lightning Component Framework, developers and their business partners can combine custom and standard components with components from the AppExchange to build amazing apps even faster.

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Salesforce1 Mobile Platform

- Rapidly build enterprise mobile apps connected to your customers' data with Salesforce Platform Mobile Services. Leverage the tools, frameworks and APIs you need to build apps for any device. Combine HTML5, native or hybrid apps with rich device features and your enterprise data to create engaging mobile apps.

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How to access Salesforce

- Production Server Access
  - https://login.salesforce.com
- Developer Edition:
  - https://developer.salesforce.com/signup
  - Trailhead
    - https://trailhead.salesforce.com/

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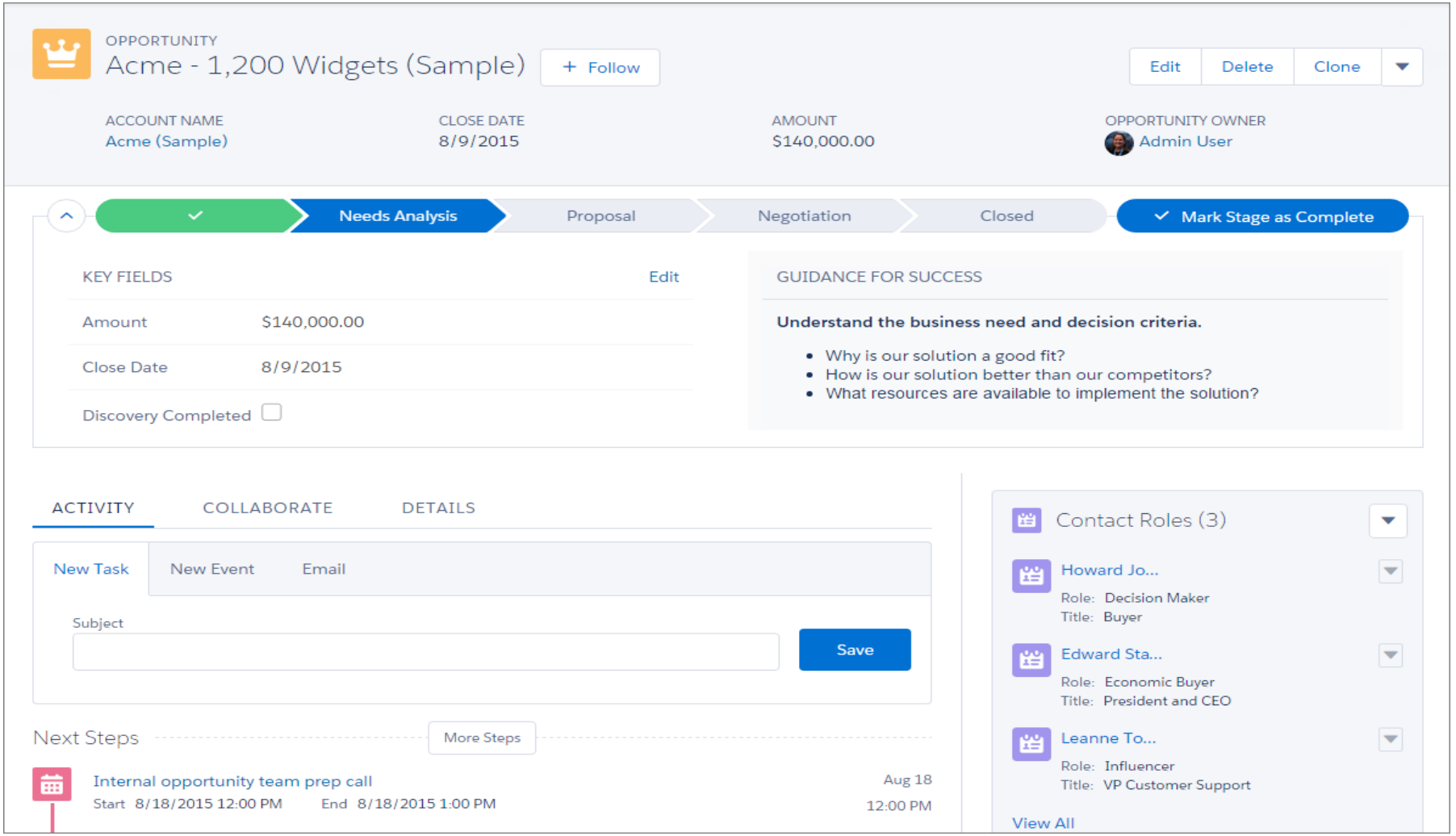
Salesforce integration Architecture – Case Studies

Sample Salesforce page in Lightning Experience



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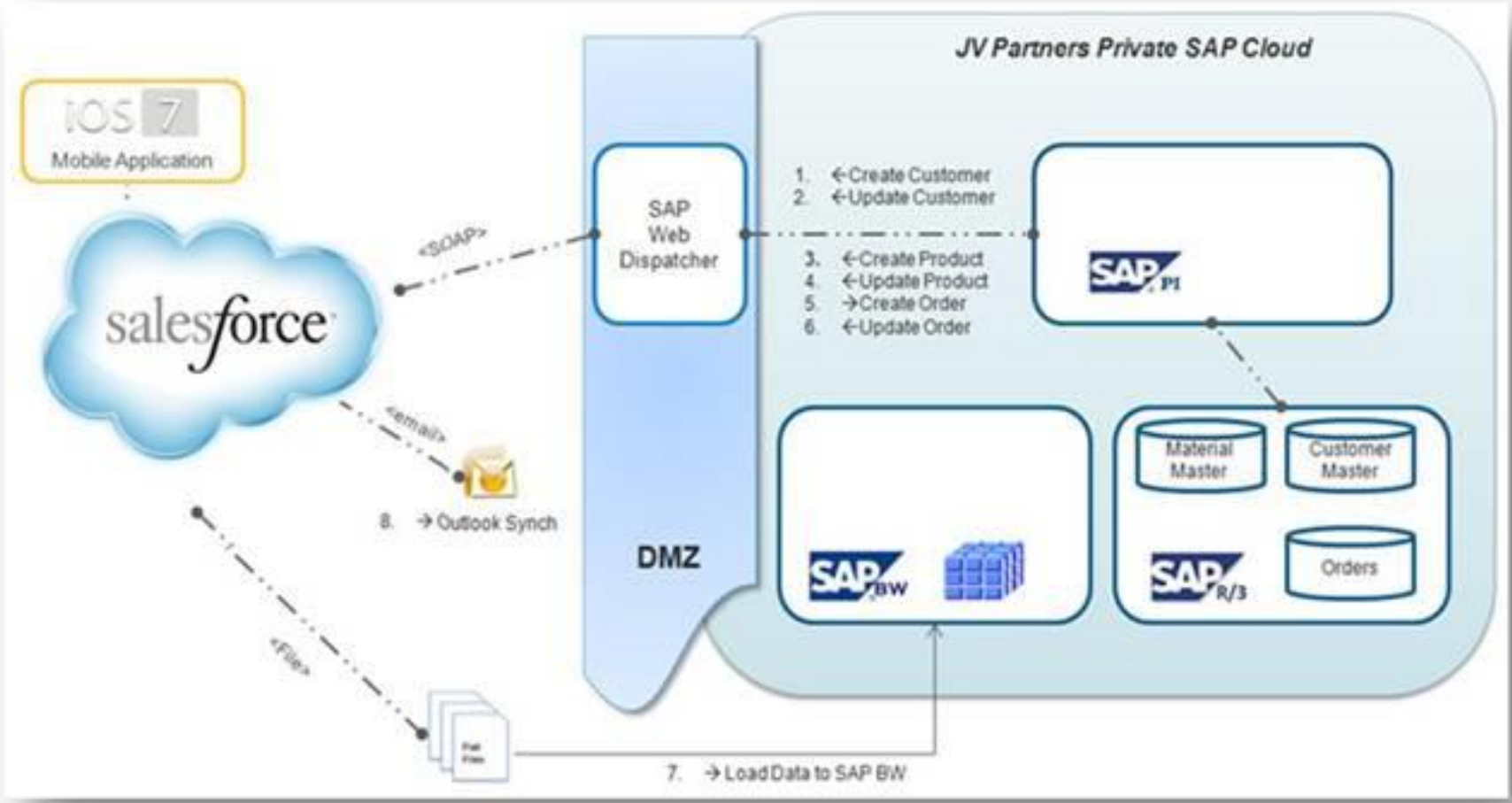
Salesforce Integration with SAP (popular use case) – Maxima Project



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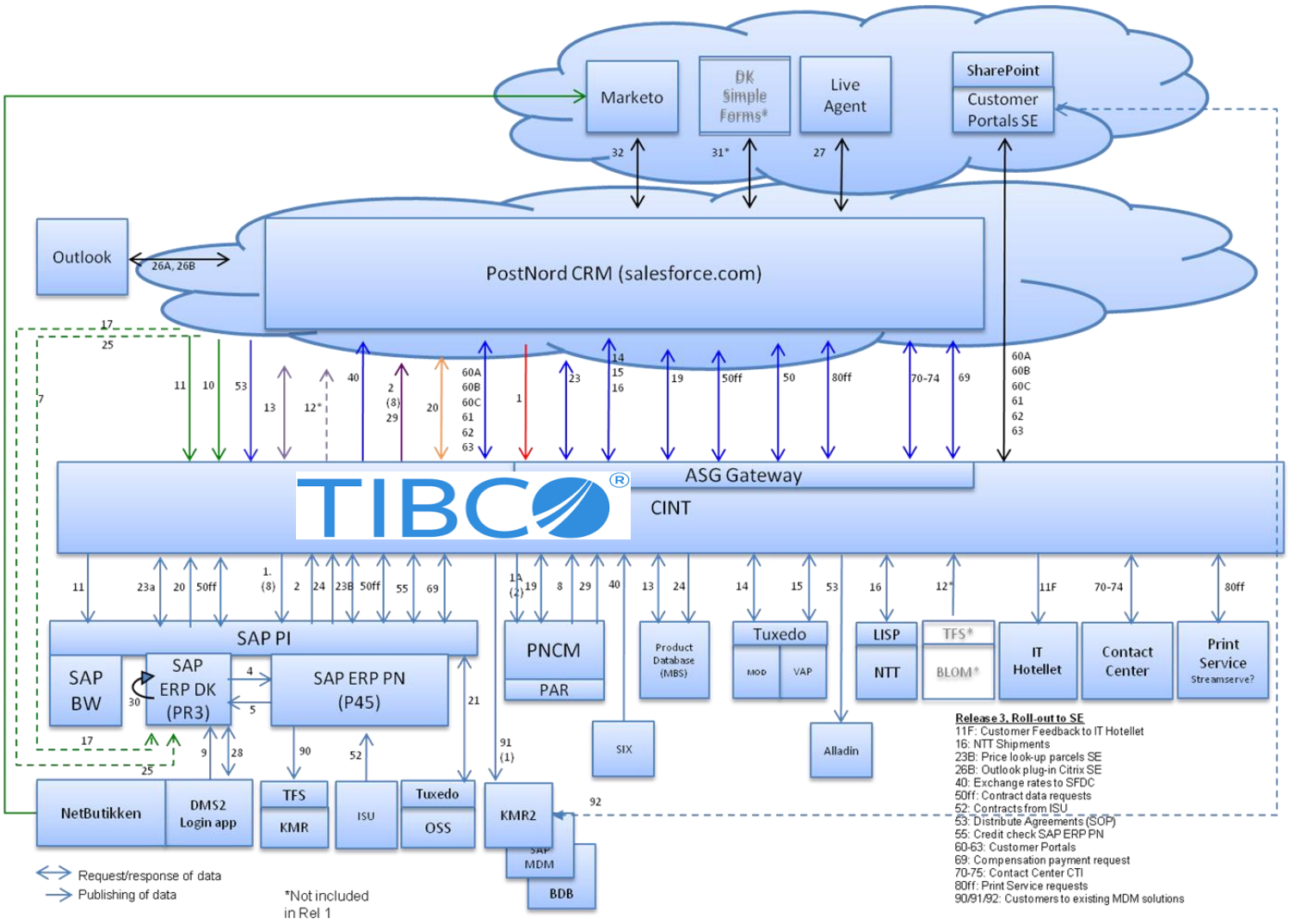
Salesforce – SAP integration via ESB (Tibco) – PostNord Project



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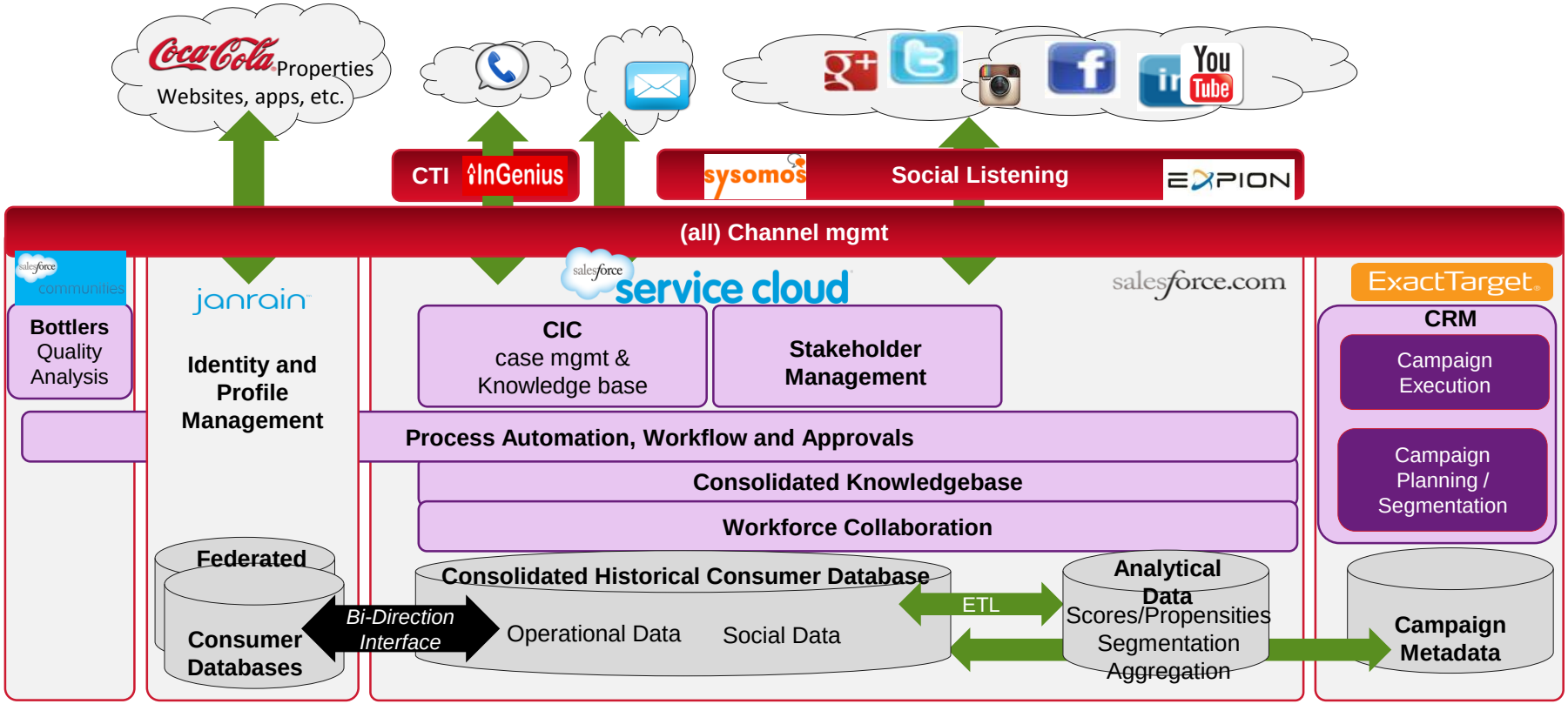
Salesforce Integration in Coca-Cola Global Hub project



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