

SalesForce Admin

Module 2

CRM Fundamentals



Salesforce and CRM Basics





Topics to be covered

- What is a CRM
- Advantages of a CRM
- What is Salesforce
- CRM vs ERP
- Why we choose Salesforce

1

What is a CRM?



CRM Fundamentals

- Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers.
 - Example: When you visit **Amazon.com** you're instantly asked to Sign up for an Account and enter your details to start off.
 - All your person information goes Amazon's CRM.
 - The CRM is then used to send you regular Amazon updates and offers, keep track of your purchase behavior etc and provide you with relevant product advertisements based on analytics in the CRM.
 - Coca-cola being a B2B business uses a CRM to manage all their vendors and send them regular offers.
 - It also tracks all orders and invoices to its vendors using a CRM





CRM Goal

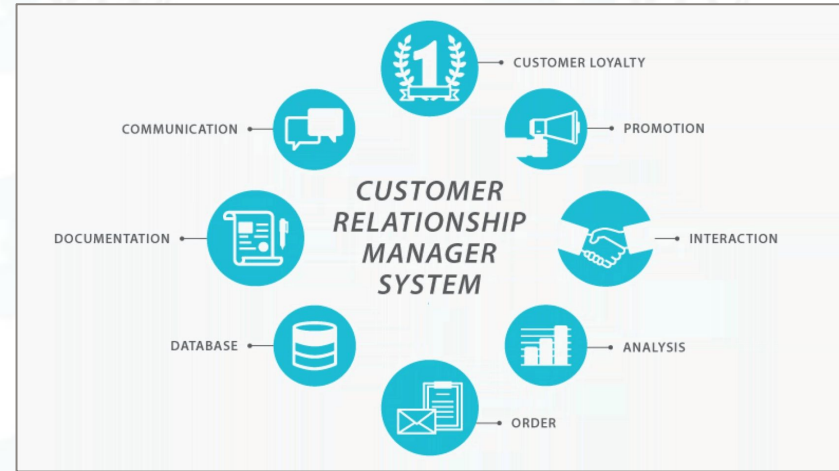
- The goal is simple: Improve business relationships.
- A CRM system helps companies
 - stay connected to customers
 - streamline processes
 - improve profitability.



CRM Fundamentals

- When people talk about CRM, they are usually referring to a CRM system, a tool that helps with contact management, sales management, productivity, and more.
- A CRM solution helps you focus on your organisation's relationships with individual people such as:
 - customers, service users, colleagues, or suppliers — throughout your lifecycle with them.
- It includes:
 - finding new customers
 - winning their business
 - and providing support and additional services

CRM Fundamentals



2

Advantages of a CRM



Advantages of a CRM

Better customer service	A CRM manages all of your contacts and gathers important customer information in one place – like: demographics, purchase records and previous messages across all channels. It makes the data easily accessible to anyone in your company who needs it.
Improved customer retention	The CRM will provide sentiment analysis, automated ticketing, customer support automation and user behavior tracking to help you determine problems and quickly address them with your customers.
Detailed analytics	CRM software typically has built-in analytic capabilities to contextualize data, breaking it down into actionable items and easily understood metrics.
Streamlined internal communications	Aside from facilitating communication between your business and your customers, a CRM can make it easier for your employees to communicate with each other.



Advantages of a CRM

Higher productivity and efficiency	CRM software uses marketing automation technology, which expedites manual and repetitive tasks and freed up your employees' time to focus on work only humans can handle, like creating content.
Managed communications with prospective leads (potential customers)	A CRM automatically manages the process, sending your employees alerts when they should reach out to the prospect and tracking every interaction , from emails to phone calls.
Improved customer segmentation	A CRM will automatically segment your contact lists based on your criteria. It makes easy to find the ones you want to contact at any given time. You can sort contacts by location, gender, age, buyer stage and more. <i>For example: find people that are above 50 years old living in Detroit.</i>
More accurate sales forecasting	Using the automated sales reports in CRM software, you can identify key trends and get an idea of what to expect from your future sales cycle performance and adjust accordingly.

3

What is Salesforce



What is Salesforce

- Salesforce, Inc. is a famous American cloud-based software company that provides CRM services.
 - Salesforce is a popular CRM tool for support, sales, and marketing teams worldwide.
- Salesforce services allow businesses to use cloud technology to better connect with partners, existing and and potential customers.
- Using the Salesforce CRM, companies can track customer activity, market to customers, and many more services.

Salesforce Features

Key Salesforce CRM Features



**A 360-DEGREE
CUSTOMER PROFILE**



**SALES
AUTOMATION**



**MARKETING
AUTOMATION**



**CUSTOMER SERVICE
AUTOMATION**

4

CRM vs ERP



CRM vs ERP

ERP is → Enterprise Resource Planning

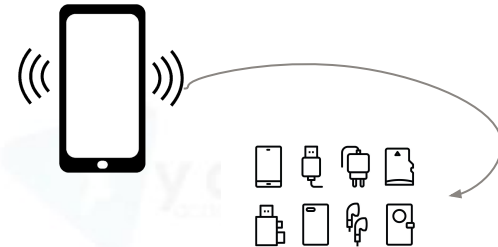
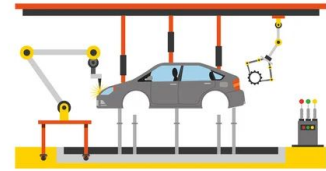
CRM is → Customer Relationship Management.

- **ERP:** is the integrated management of main business processes, often in real time and mediated by software and technology.
 - **Example:** Toyota uses an ERP system to manage all its manufacturing, supply chain, distribution and back office data of the organization.
- **CRM:** Customer relationship management is an approach to managing a company's interaction with current and potential customers.

It uses data analysis about customers' history with the company to improve business relationships with customers.

It then specifically focuses on customer retention and ultimately driving sales growth.

- **Example:** Alice bought a phone, then company targets to sell her phone case and headphones.





ERP vs CRM

ERP		CRM
Based on back-office functions	Process	Based on customer
Minimise costs	Objective	Maximise profits
Back-end functions like Accounting, human resources	Teams that use	Front end functions like Sales, marketing
Project management, supply chain management	Benefits	Contact management, customer database management, customer engagement
Most ERPs are expensive software primarily meant for large firms	Budget	Some affordable CRMs are available, with pay-as-you-go plan

5

Why choose Salesforce



Why Salesforce?

Salesforce is the world's leading cloud-based CRM software that helps your business grow into a more streamlined, effective, and efficient organization.

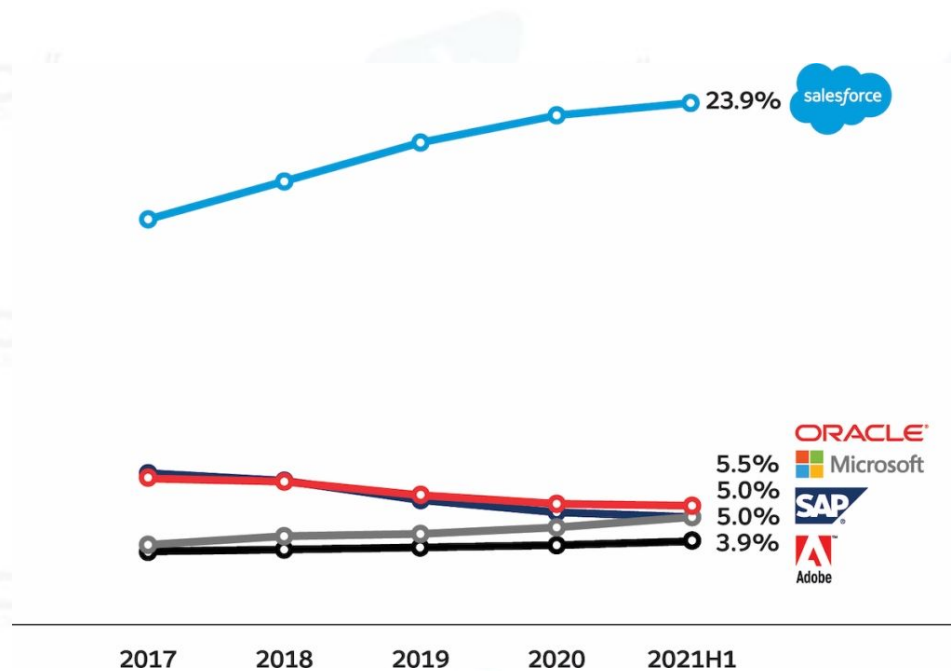
There are many advantages of using salesforce. Some major benefits are listed below:

- **Easy to Use**
- **Cloud-Based**
- **AppExchange Ecosystem**





Salesforce Market Share



Why Salesforce?

Easy to Use:

Salesforce is just as easy to use as the websites you visit every day.

You can login from anywhere, collaborate with your colleagues, and view and update customer data whenever you want.



Cloud-Based:

Salesforce takes flexibility to the next level. You can use it anywhere and at any time. It offers cloud solutions for Sales, Marketing, Support, and Analytics.



AppExchange Ecosystem:

AppExchange in Salesforce allows you to develop and market your own app or get access to thousands of useful, secured and verified applications and integrations built by other users



Force.com & Environments





Topics to be covered

- Salesforce Editions
- Salesforce Environments
- Production vs Sandbox
- Types of Sandboxes

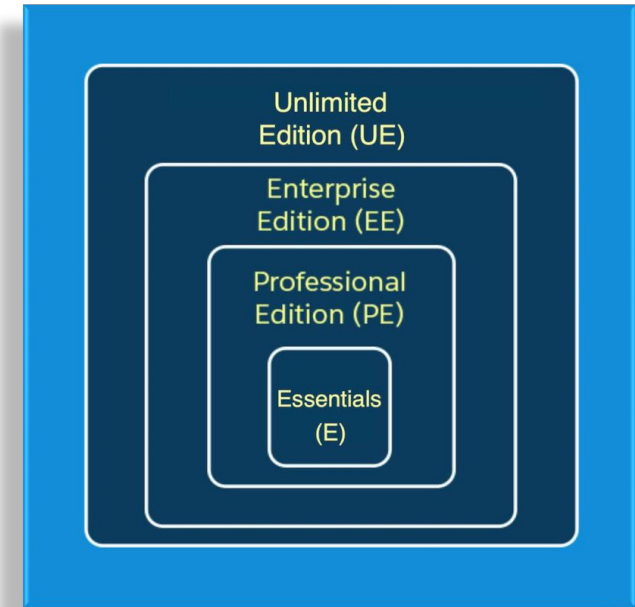
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Salesforce Editions



Salesforce Editions

- Different Salesforce editions share a look and feel but vary by functionality and pricing.
 - Some customers start with a basic edition and upgrade to a more feature-rich edition as business requirements evolve.
- Take an example of a car that has 3 different variants.
 - **Basic variant:** Leather seats with no heated seat option price is \$15000.
 - **Advance variant:** Leather seats with heated seat option price is \$20000.
 - **Top of the line variant:** Leather seats with no heated seat option and sunroof price is \$25000.





Salesforce Editions

Essential	Designed for small businesses that want to get started with a CRM system quickly.
Professional	Designed for businesses requiring full-featured CRM functionality .
Enterprise	It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition
Unlimited	Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits , and other features.
Developer	It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition.

Salesforce Editions - Comparison





Features	Salesforce Essential	Professional	Enterprise	Unlimited
Find & Manage Leads better	-	-	✓	✓
Manage Customer and Sales details	-	-	✓	✓
Sell from anywhere on any device	✓	✓	✓	✓
Forecast Sales accurately	-	-	✓	✓
Configure Price, Quote & Billing	-	✓	✓	✓
Get real-time Sales insights	-	-	✓	✓
Collaborate across your company	-	✓	✓	✓
Extend Salesforce to your partners	-	-	✓	✓
Customize and Automate processes	-	-	✓	✓



Question?

- A new small business startup is planning to purchase Salesforce as their customer relationship management software.

They currently don't have any client base or client data but they hope to organically develop a customer data directory with time.

Which Salesforce edition should they purchase and why?

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Salesforce Environments



Salesforce Environments

An **environment** is an instance of Force.com platform which can also be called an **organization**.

- Salesforce Environments lets users access, deploy or create applications with various feature sets.

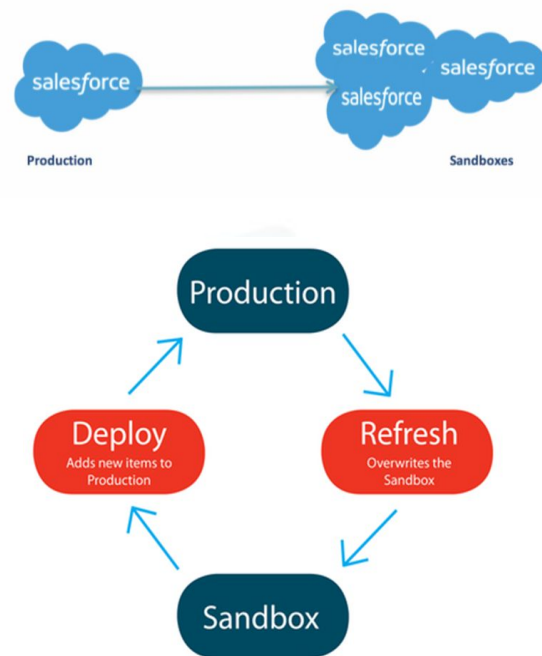
Example: A good way to think about an instance of Force.com, is to think about Gmail; When users sign up for Gmail, they get a unique username and access to their private email account in the cloud. Similarly, when users sign up for a Force.com organization, they get a unique username and private access to their Force.com cloud computing environment.





Types of Salesforce Environments

Production	Designed for small businesses that want to get started with a CRM system quickly – These are those environments that have active paying users accessing business-critical data.
Development	Designed for businesses requiring full-featured CRM functionality – These are the environments where you can extend, integrate and develop on Force.com without affecting your production environments.
Test	It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition. These can be considered production or development environments which are specifically used for testing application functionality before deploying to production or releasing to customers.





Environment Use Cases

- If company is a customer, they will use a production environment to run their business.
 - If company wants little to no customization, they would go with just production environment.
- If company is a partner or a development firm, focusing on doing salesforce customization for their clients, they will most likely have multiple developments and test environments to build functionality.
- If large company have their own team for customization, they would have development, testing and production environments.

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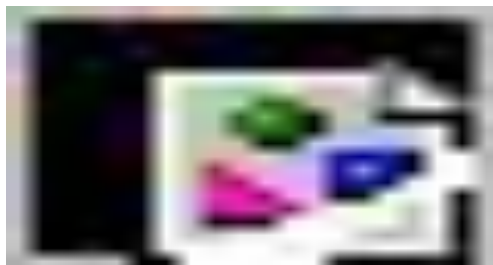
Production vs Sandbox



Production vs Sandbox

Production	It is the live org/instance (workspace) which is used by end-users. It houses all the actual data and operations. (This is what customers see and use)
Sandbox	They are replicas of the production org in separate environments. They do not contain any live data or active users. We use them for development, testing, and training, without compromising the data and applications in production org.

For example Before sending soldiers on a battlefield, soldiers, are provided with a mock environment and simulations, and only after clearing them they can be sent out to the real battlefield.





4

Types of Sandboxes

Types of Sandboxes

Developer Sandbox	<p>A Developer Salesforce Sandbox is intended for coding and testing by a single developer and provides an isolated environment to all applications and systems until they are ready to be shared. Further, it gives you 200 MB of storage for use. It is free of cost. This is what we will be using during our program. Once you refresh the Developer Sandbox then to refresh it again you have to wait for 1 Day.</p> <p>Refreshing a Sandbox means updating it to Production's current structure. For example if any changes or additions are directly made in Production, a Sandbox needs to be refreshed in order to reflect that change.</p>
Developer Pro Sandbox	<p>A Developer Pro Sandbox provides the same functionality as the Developer Sandbox, with addition to increasing file and data storage. This one gives 1 GB of data storage to use. It can handle more tasks mostly based on development and quality assurance for testing and training. Further, it is also free of cost. Once you refresh the Developer Pro Sandbox then to refresh it again you have to wait for 1 Day.</p>
Partial Copy Sandbox	<p>In simpler words, Partial Copy Salesforce Sandbox is actually Developer Pro Sandbox in addition to the data you will include in the sandbox. Partial Copy sandboxes provide 5 GB of data storage and are paid version. Once you refresh the Partial Data Sandbox then to refresh it again you have to wait for 5 Days.</p>
Full Copy Sandbox	<p>This sandbox provides an exact replica of your entire production organization along with all the data. It is fully intended to be used as a testing environment. Furthermore, it provides data storage equivalent to your production organization and is also paid version. (This is UAT environment. User will get to see closest to production version). Once you refresh the Full Copy Sandbox then to refresh it again you have to wait for 29 Days.</p>



Real Examples of Sandbox Types

Developer Sandbox	A constructed House structure with the exact same architecture as your actual house (Production environment) but with unpainted walls, no doors, no furniture nothing . Just the same outlook structure
Developer Pro Sandbox	A constructed House structure with the exact same architecture as your actual house (Production environment) with painted walls and rooms, doors, windows etc but no furniture .
Partial Copy Sandbox	A constructed House structure with the exact same architecture as your actual house (Production environment) with painted walls and rooms, doors, windows and all furniture etc
Full Copy Sandbox	A constructed House structure with the exact same architecture as your actual house (Production environment) with painted walls and rooms, doors, windows and all furniture containing all your clothes and all other personal belongings etc in the drawers, closets etc . An exact same replica of the home that you live in with all your stuff.

Types of Sandboxes





Certification Questions

1. Cloud Kicks wants to try out an app from the AppExchange to ensure that the app meets its needs. Which two options should the administrator suggest? Choose two answers
 - a. Test Drive in a production org.
 - b. Download into a Trailhead Playground.**
 - c. Install in a sandbox.**
 - d. Check edition compatibility.