

A young child with brown hair and eyes is the central figure. They are wearing a bright yellow, chunky-knit beanie and a dark green jacket over a red and white patterned sweater. Their hands are held up to their eyes, with fingers spread, as if they are peeking or playing hide-and-seek. The background is a blurred blue, suggesting an outdoor setting. The text 'Software Cloud Computing' is overlaid on the left side of the image in a large, white, sans-serif font. A small horizontal line is positioned above the word 'Software'.

# Software Cloud Computing

isobar

# isobar

Welcome to the first Course  
collaboration with **isobar.ch**



# — Index

Week #1 – Lesson #1

1. Class Information
2. Syllabus and agenda
3. What is CRM?
4. Cloud and Salesforce.COM
5. References



# Who we are



**António Alvim**

[antonio.alvim@isobar.com](mailto:antonio.alvim@isobar.com)

Master in Software Engineering @  
Carnegie Mellon

Financial Services; Energy ; Consultancy

15+ years of Software Development

- CRM Platform Development
- Requirement Analysis
- Project Management
- Near Shoring Projects
- Agile



**Luís Baptista**

[luis.baptista@isobar.com](mailto:luis.baptista@isobar.com)

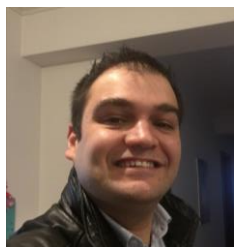
Degree in Computer Engineering @ IPG

Web; eCommerce; Mobile apps; API  
development

20+ years of Software Development

- Portal and CMS development
- Commerce in Web / Mobile
- Requirements and Project Analysis
- Bet/Gaming API for Developers

# Who we are



**Tiago Coelho**

[tiago.Coelho@isobar.com](mailto:tiago.Coelho@isobar.com)

Degree in Computer Engineering @ ESTCB

Consultancy; Telcos; Web; CRM; Release Management; Integration

10+ years of Software Development

- CRM Platform Development
- Continuous Integration and Delivery
- System Integration and API's Design
- DevOps
- Near Shoring Projects



**Fernando Gavinho**

[fernando.gavinho@isobar.com](mailto:fernando.gavinho@isobar.com)

Self-taught @ internet/on the job

Web; CRM; Architecture; Release Management

6+ years of Software Development

- Multiple projects
- Continuous Integration and Delivery
- Code Reviews
- Developer onboarding
- Multi-system integration
- Identity Management

# Class Calendar and Structure

## **1<sup>st</sup> half (until Mid April):**

Theory + Hands On:

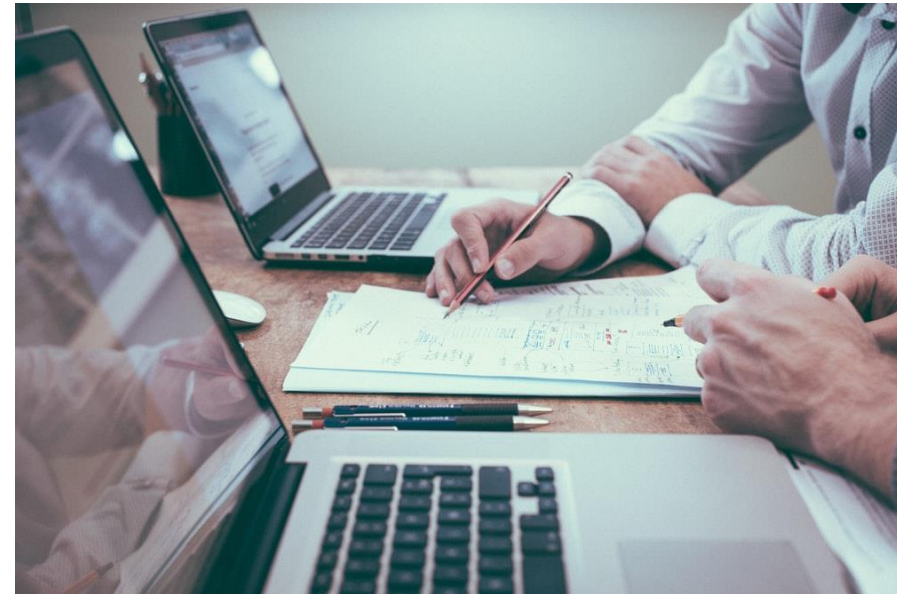
- Slides + hands on smaller exercises
- 1 Multiple Choice Exam (25%)

## **2<sup>nd</sup> half (after Mid April)**

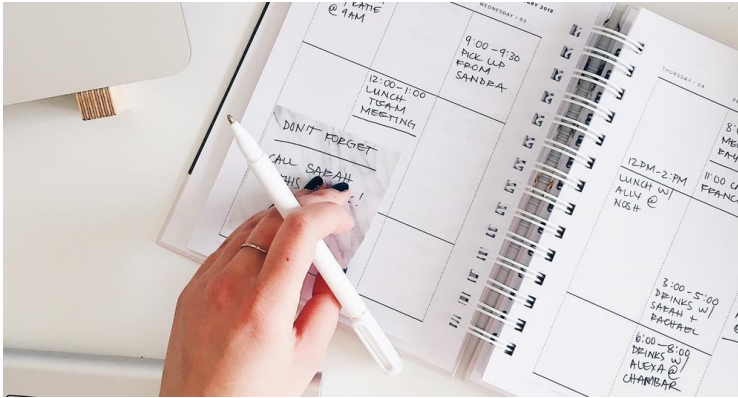
Project + Presentation:

- Larger exercise
- Group Defense (75%) – Middle and End of Semester Presentations

**Participation is relevant  
(2/3 mandatory)**



## PERIODICITY



## WHEN

- Once a Week (Mondays!)
- Ad-hoc Support lectures / office hours [optional]

## METHODOLOGY



## HOW

- Two / Three teachers
- Slides + Exercises
- Multiple Choice
- Group Presentations – Middle and End of Semester Presentations.

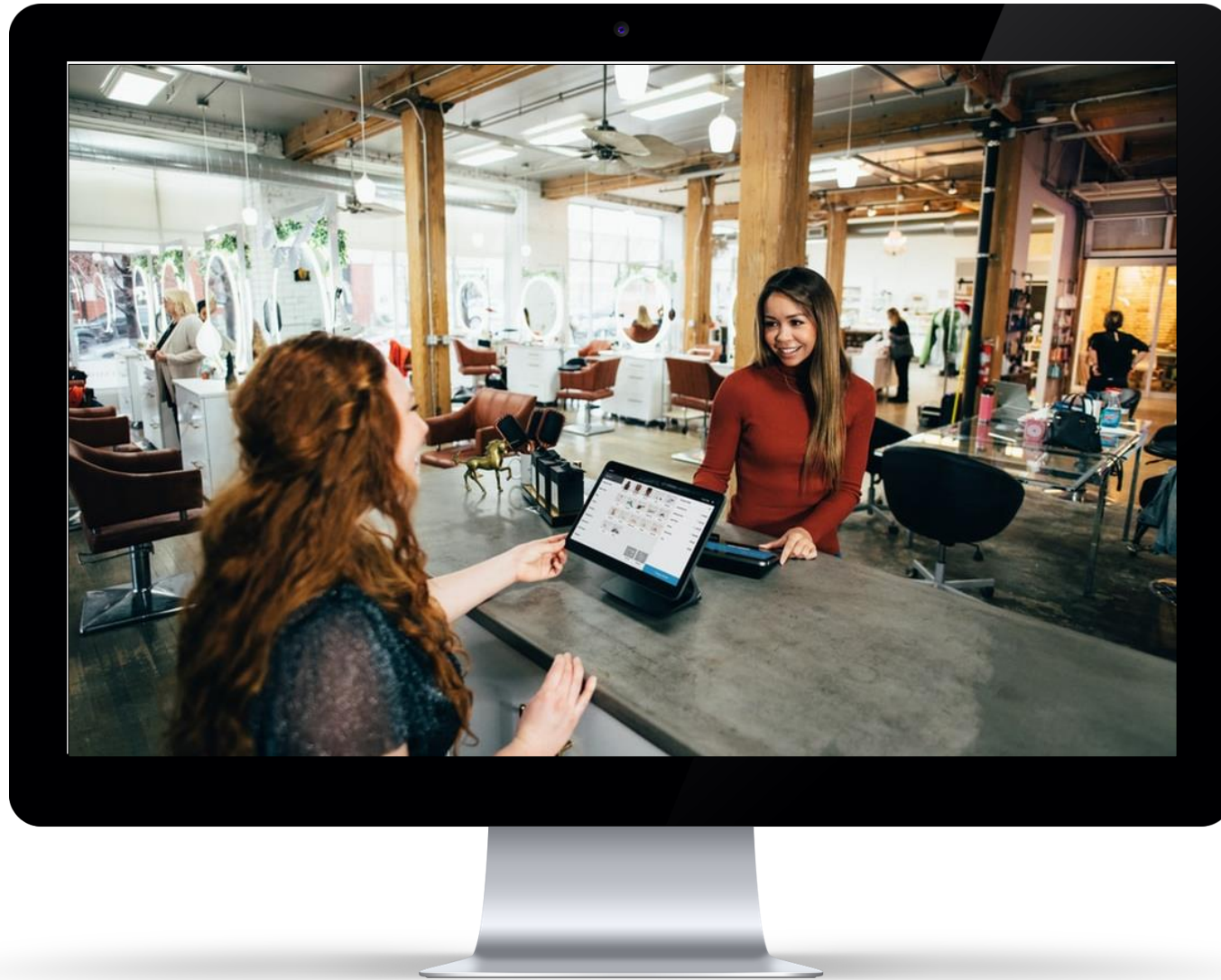
## REFERENCE MATERIAL



## WHAT

- Official Salesforce Documentation







---

*“As we talk about devices, you should never forget that behind every one there is a person - a customer. It's not the Internet of Things, but the Internet of People - of customers. We are moving to one-to-one relationships.”*





"MILITARY" PICKLE

AMER

Griffins  
J. NELSON  
CONFECTIONERY

CHAMPION  
VULGAR  
BEST BLUE IN THE WORLD  
KEENS OXFORD

AMOUNT  
PURCHASED

DI MORSES INDIAN ROOT PILLS

"K JAM IS PURE K JAM"

HONEY  
HONEY

Almond

"reactive"



**Sales, Service & Marketing**



**CRM (Information System)**



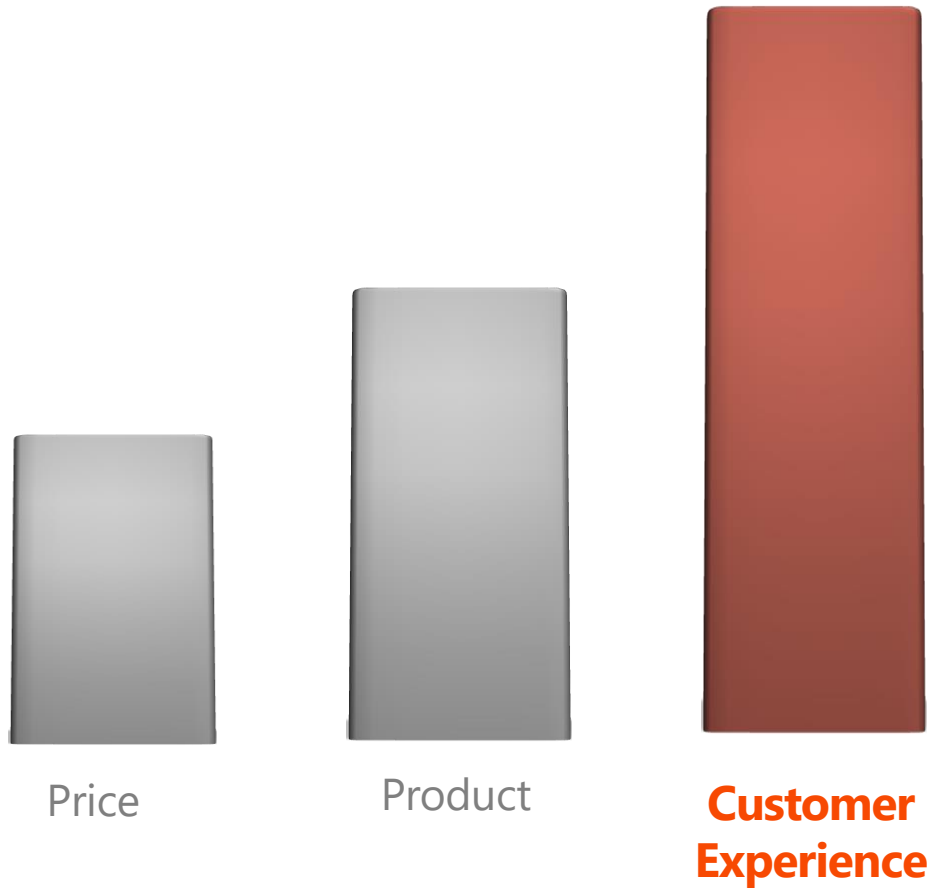
"anticipatory & proactive"



**Customer Experience**



# The future is about customer experience...



Source: (Walker, 2020)

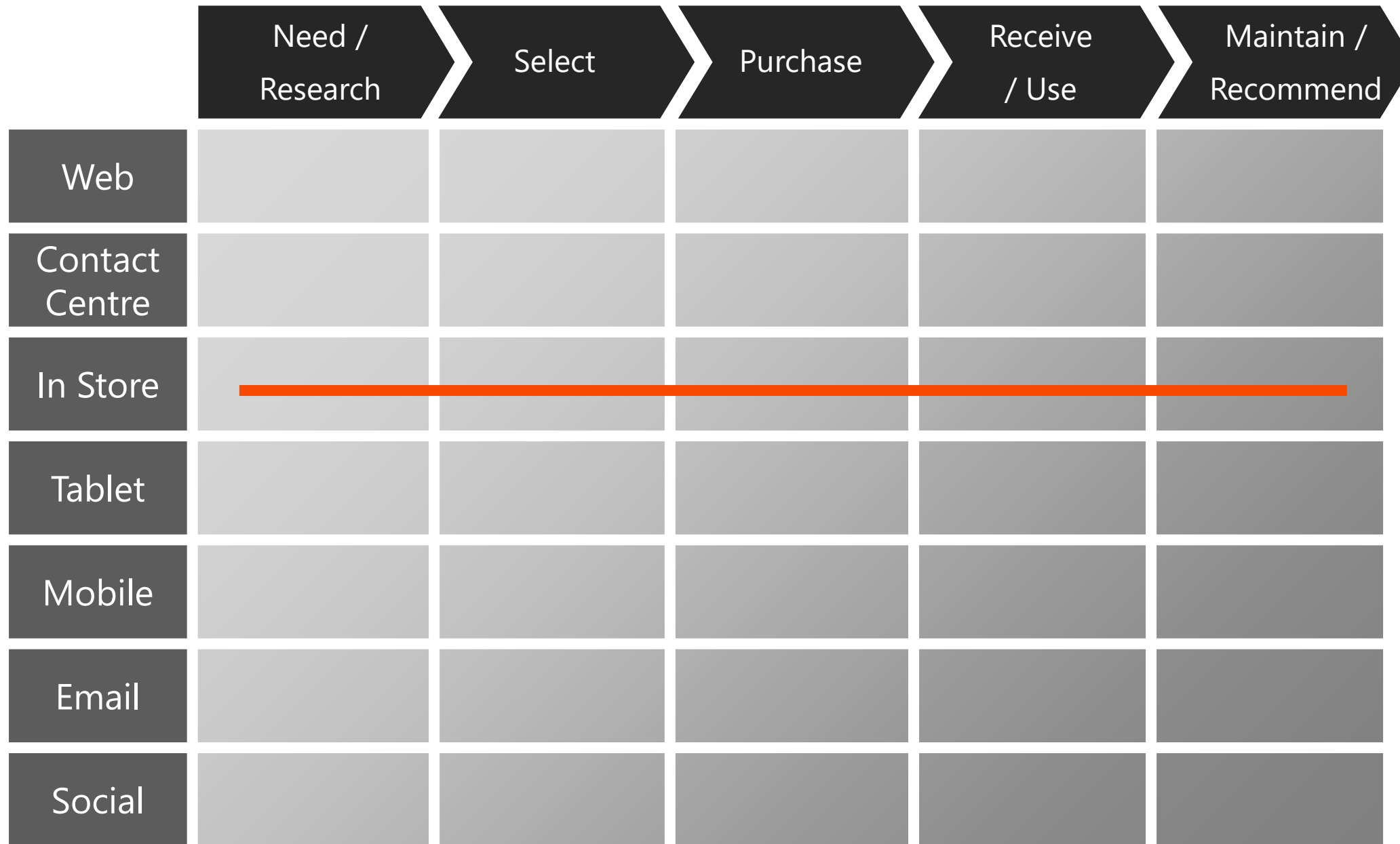
# #1

"Customer experience has overtaken price and product as the key brand differentiator."

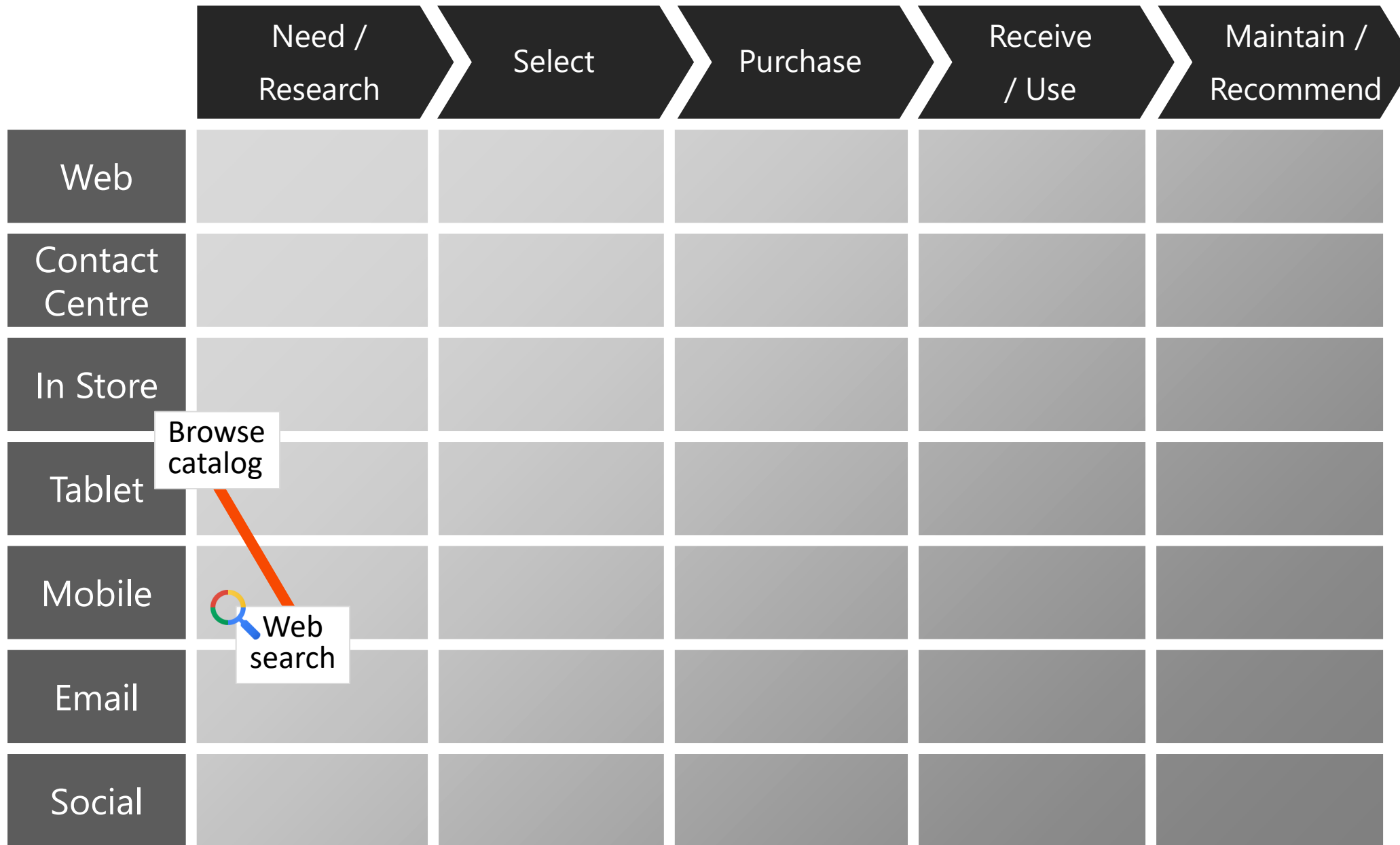
*Slides Adapted from: "Transforming Customer Experience with Salesforce" (Salesforce, 2016)*



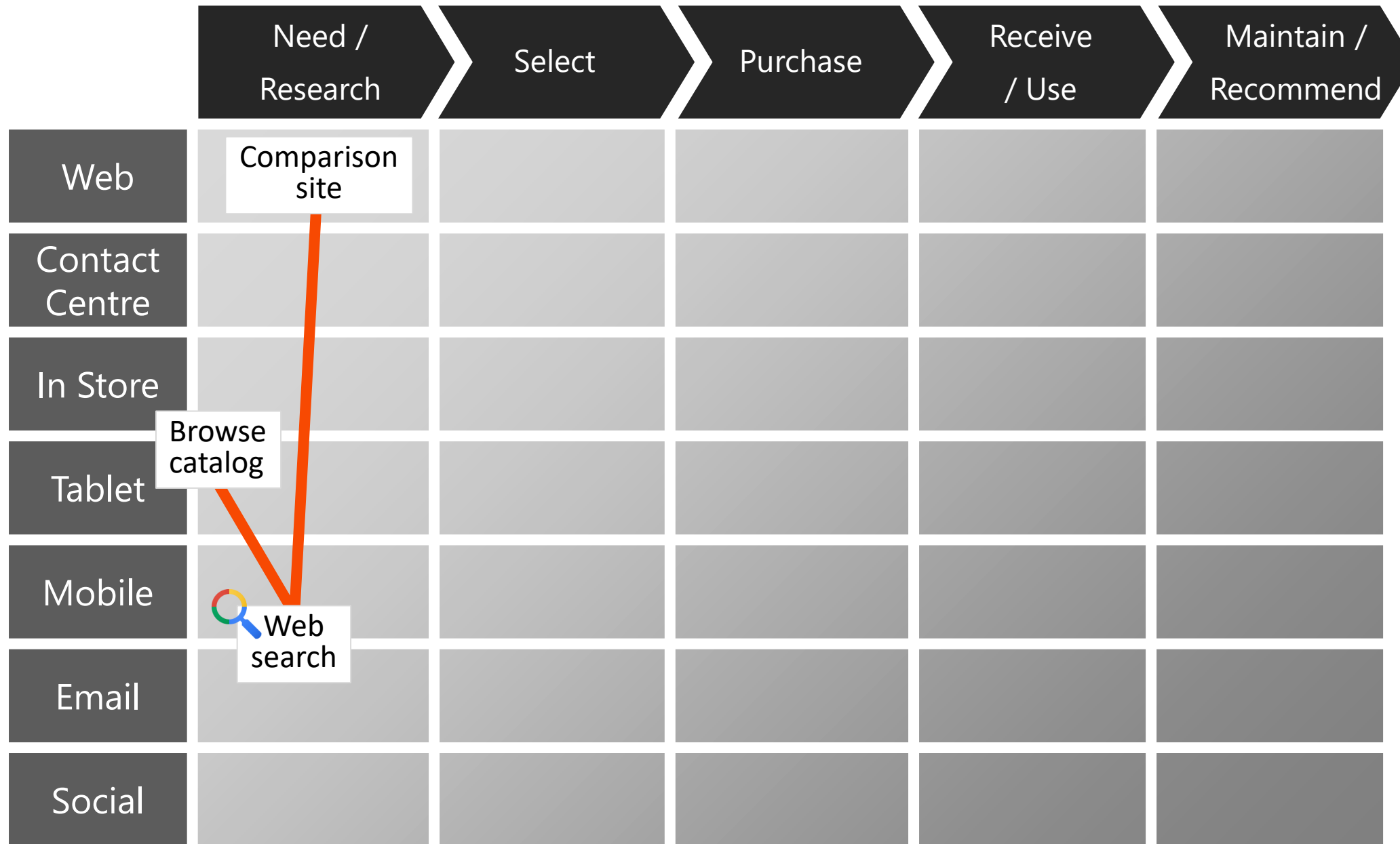
# CX exists across Multiple channels / applications



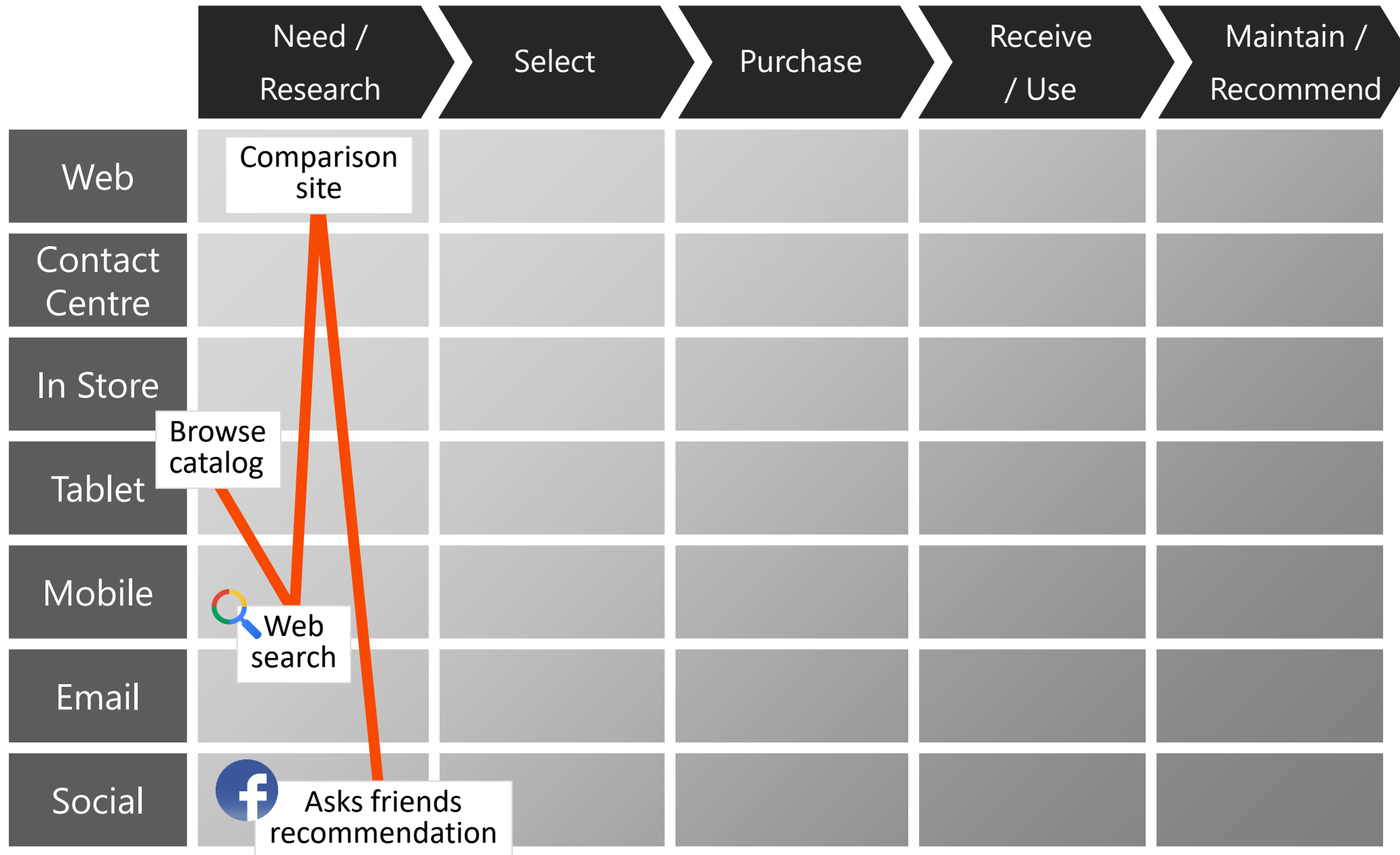
# CX exists across Multiple channels / applications



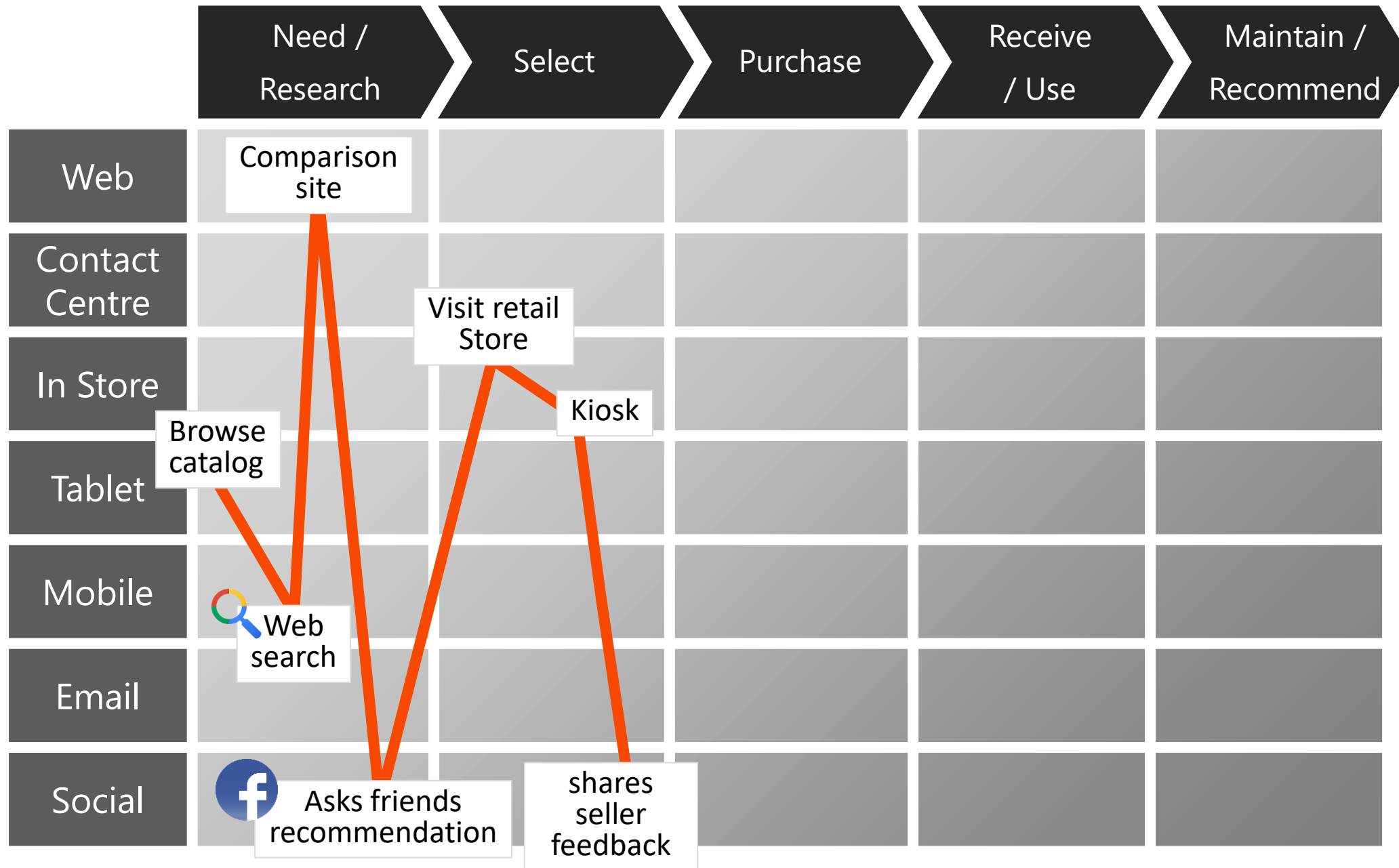
# CX exists across Multiple channels / applications



# CX exists across Multiple channels / applications

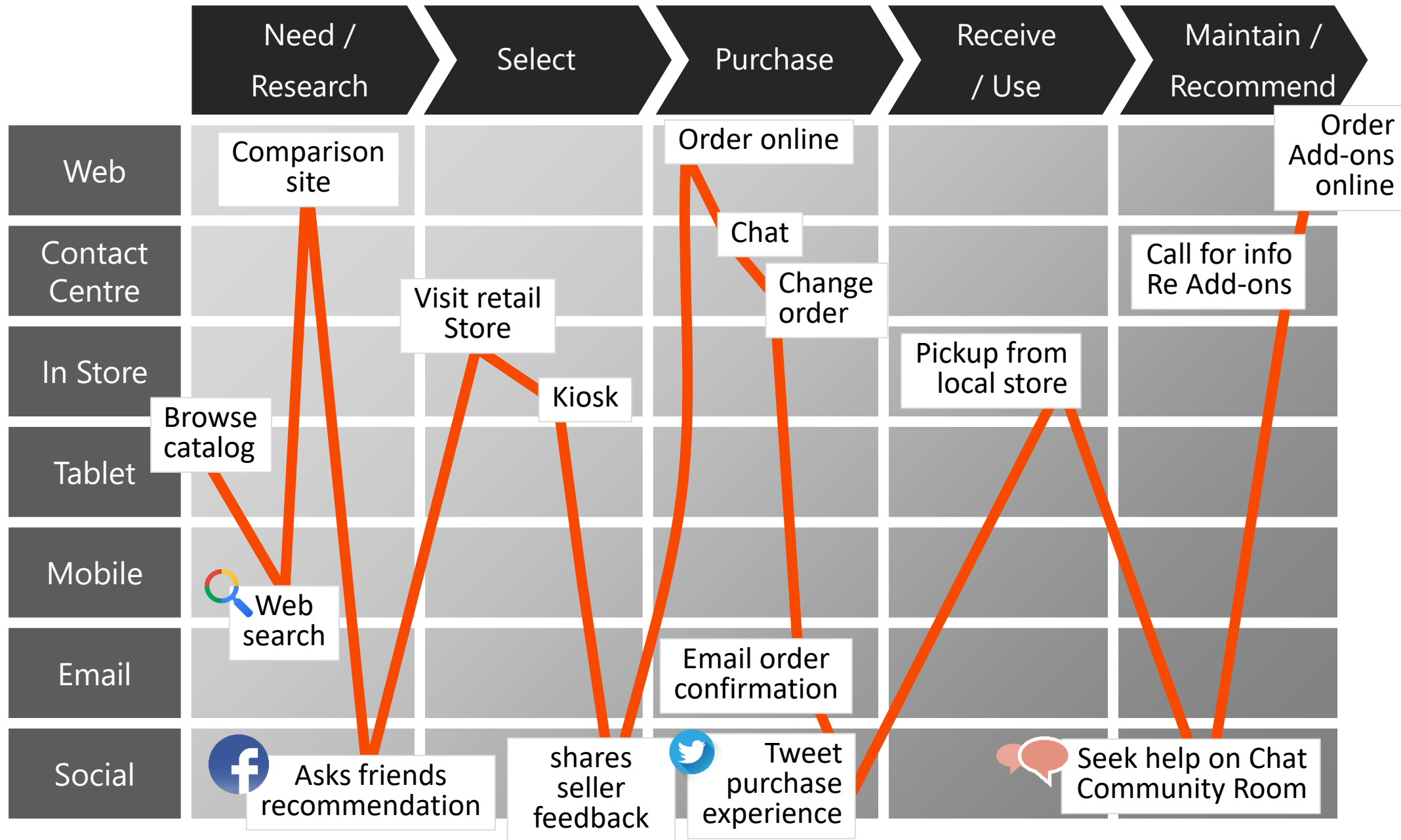


# CX exists across Multiple channels / applications

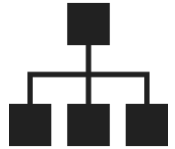




# CX exists across Multiple channels / applications



# Key Remarks



Customers **don't care** about internal departments.



Customers **expect brands** to connect the journey.



Customers **expect brands** to remember them.



Customers **expect brands** to adapt to their needs.



#1



## BUSINESS

Can anyone give me an example of a CRM business activity?

[Hint: Sales, Service, Marketing]

#2



## IT

What is the most important course to understanding this course?

- A) Databases
- B) Programming
- C) Algorithms & Data Structures
- D) Software Engineering

[Hint: More than one is correct]

#3



## MIXING IT UP

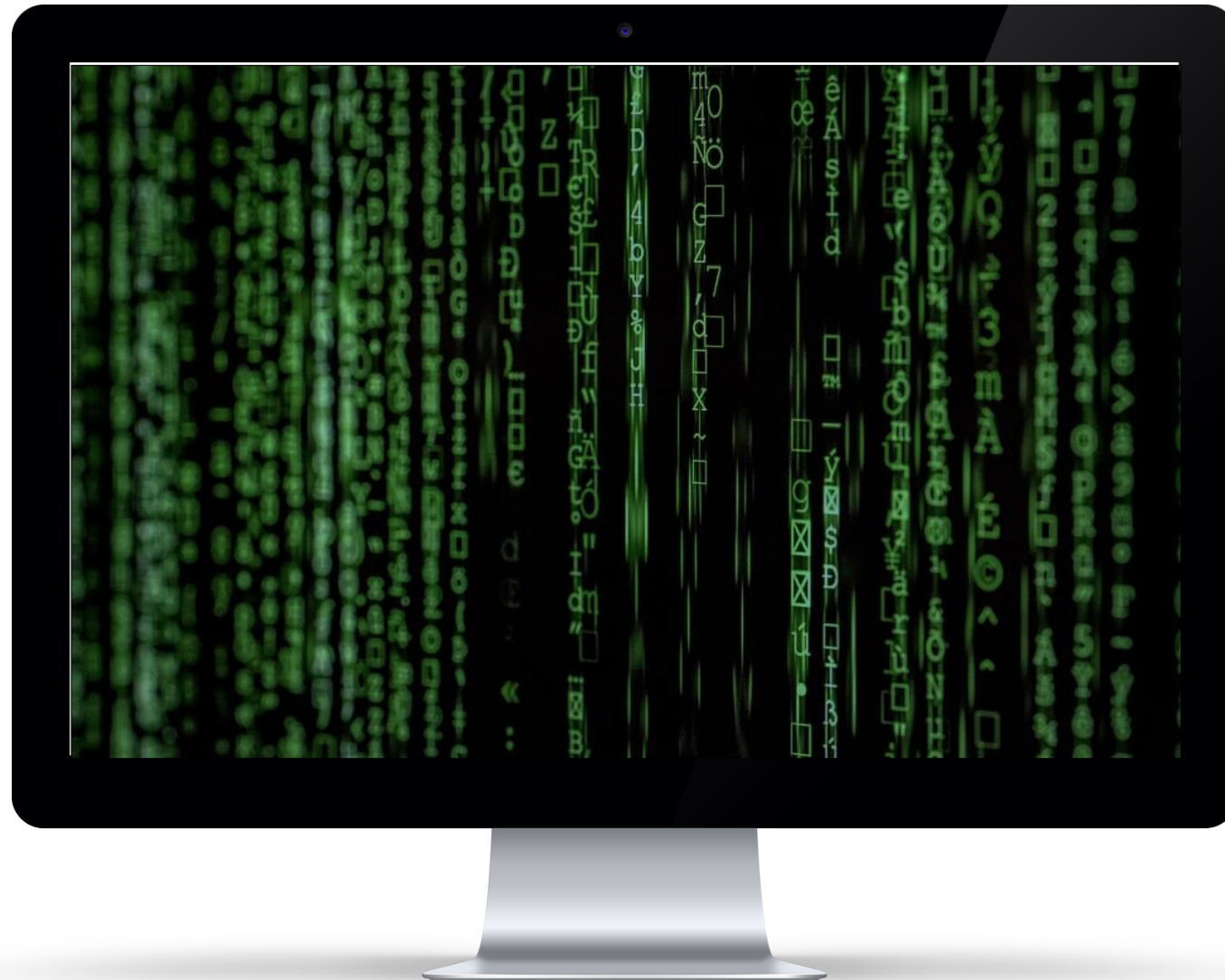
What is typically considered the Core / Central Table on the databases of a CRM System?

[Hint: 360° view of ...]



Salesforce facilitates the following customer **interactions**

- **Sell** – Products, Services, quoting
- **Service** – Repairing, Helping
- Market – tracking **metrics**, defining selling groups
- Analyze – **measure**, compare (**Business Intelligence**)
- Connect – Realtime **communication**, chat, automatic and **connect decoupled/legacy systems**



**What does this have to do with the  
Cloud/Software?**





# Salesforce Customer Success Platform

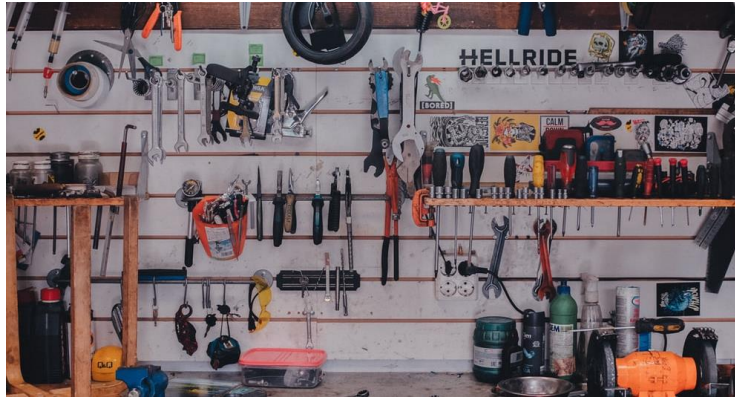


## SALES CLOUD



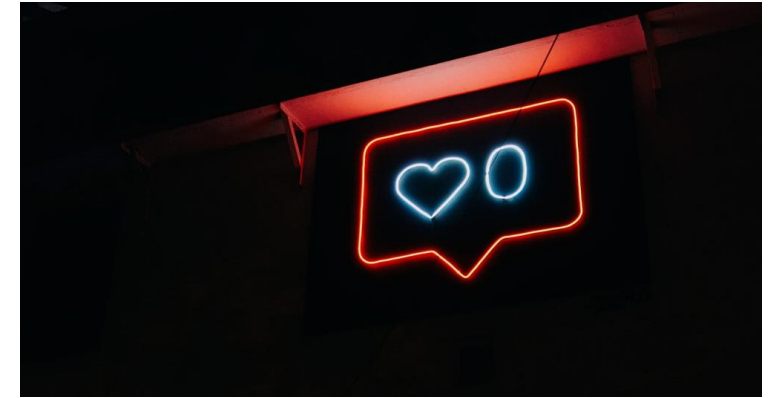
- Aggregate disperse customer information
- Scale mobile sales teams / agents
- Simplify complicated, cumbersome reporting
- Keeps the customer information in the same place, accessible to all, to sell faster & smarter

## SERVICE CLOUD



- Sales Brings - Service Retains
- Breaks Sales & Service walls – the core system is the same
- Adds interactions, questions, repairs, issues to same information.
- Provides features for solution teams to collaborate
- Facilitates Knowledge , FAQs and quick solution guides for problems

## MARKETING CLOUD



- Connects Customer Experience to the 4<sup>th</sup> industrial revolution
- Connects with the social presence of unknown and known consumers through web and Social media
- Creates personalized journeys through digital channels.
- Measures engagement.

---

## References

- Beerman, J. (2016). Transforming the Retail Customer Experience from Dull to Delight. Salesforce Blog.
- Walker. (2017). Customers 2020: A Progress Report. Walker.
- Salesforce Trailhead Modules:
  - Sales Cloud Basics
  - Service Cloud Basics
  - Get Started with Marketing Cloud

isobar

