July 20, 2021

Salesforce Bootcamp

Day 1 – Introduction to Salesforce

Deloitte.
Digital

1980s

o Shift from direct marketing to database marketing

o Foundation of today's CRM

o Contact Management Software with Sales & Marketing

2000s

o Open source & cloud-based CRMs

o Hashtag Age with domination of Social CRMs

o Transactional to interactive CRMs

o Arrival of customer service systems and cloud-based customer support platform.
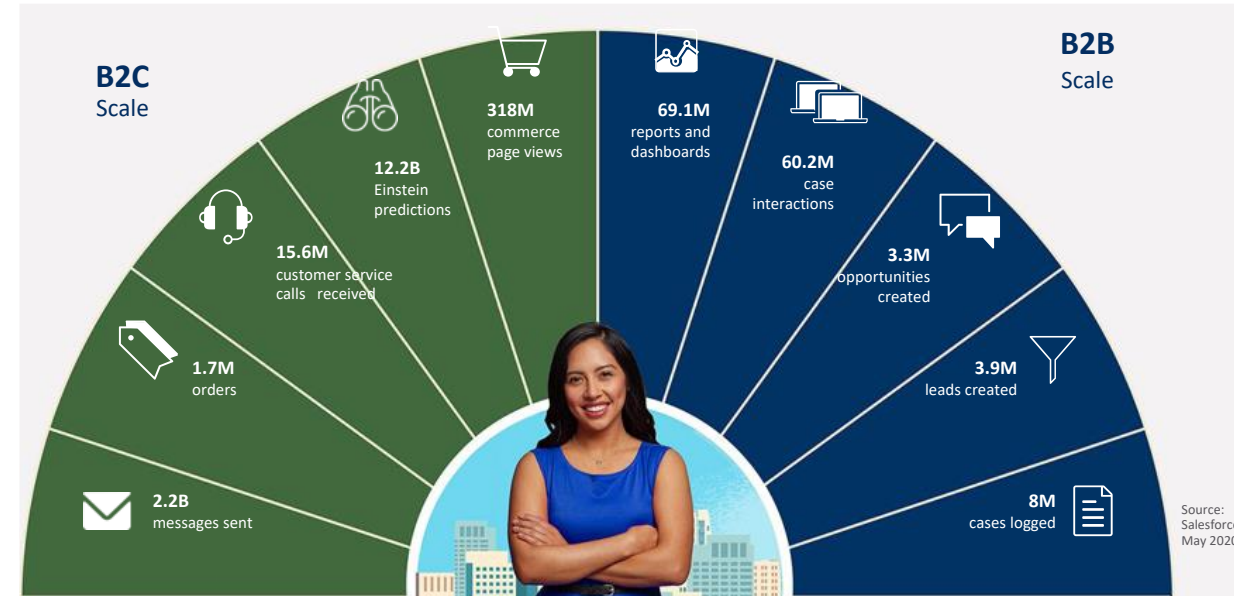
Advent of CRM – late 1950s

o Mainframe systems for managing customer data.

Today & tomorrow of CRMs

o Focused on three main areas: sales, service and marketing

o Industry specialized solutions as a replacement of standard CRMs

o Compatibility and responsive to all devices

o ALL-IN-ONE platforms to drive adoption and profitability.

o Social media, content marketing and mobile led.

1990s

o First Mobile CRM from Siebel

o Poor adoption due to lack of adequate devices

o **Salesforce.com** introduced the **first Software-as-a-Service CRM** as an alternative to expensive on-premise CRM

o First marketing automation software from Eloqua

o Popularization of Helpdesk

Journey of CRMs of today

✓ Salesforce is the **#1 CRM software provider, leader in Digital Commerce and Analytics domain** with consistently growing market share

✓ Uniquely positioned to help our customers **drive broad-based digital transformation**

✓ **Trusted platform for scale,** managing B2B complexity and B2C scale

✓ **Unique low code and no-code solutions,** providing innovation and agility

✓ **Consistently delivering durable revenue growth**, more than tripling from $5.4 billion in FY15 to $17.1 billion in FY20

✓ According to IDC, the Salesforce Economy (together with our partners and customers) will add 4.2M new jobs by 2025

B2C Scale

318M commerce page views

12.2B Einstein predictions

15.6M customer service calls received

1.7M orders

2.2B messages sent

B2B Scale

69.1M reports and dashboards

60.2M case interactions

3.3M opportunities created

3.9M leads created

8M cases logged

Source: Salesforce May 2020.

FORTUNE FUTURE 50
#1 The Future 50

#1 FORTUNE'S 100 BEST COMPANIES TO WORK FOR 2018

MEMBER OF Dow Jones Sustainability Indices
In Collaboration with RobecoSAM

HUMAN RIGHTS CAMPAIGN
Best Places to Work for LGBTQ Equality
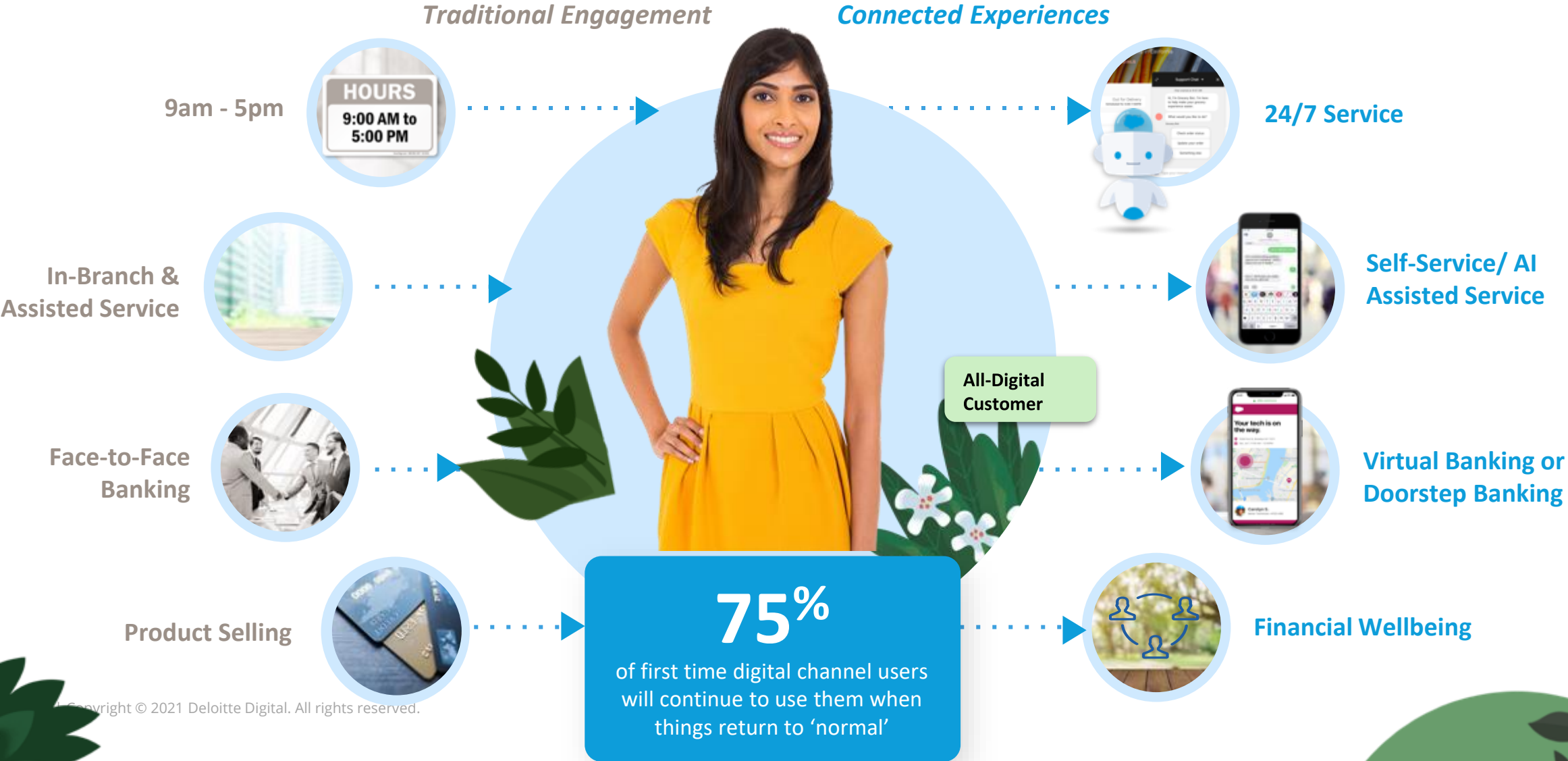
People
#1 Top 50 Companies that Care

Forbes
World's Most Innovative Companies
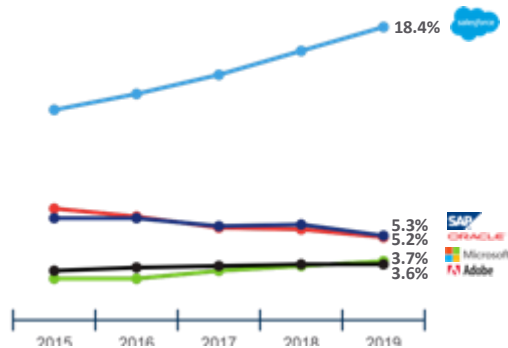
CUSTOMER ENGAGEMENT PLATFORM

REINVENTING CUSTOMER EXPERIENCES

Traditional Engagement

Connected Experiences

9am - 5pm → 24/7 Service

In-Branch & Assisted Service → Self-Service/ AI Assisted Service

All-Digital Customer

Face-to-Face Banking → Virtual Banking or Doorstep Banking

Product Selling →

75%
of first time digital channel users will continue to use them when things return to 'normal'

→ Financial Wellbeing

Source: McKinsey

#1 in CRM

Worldwide CRM applications 2019 revenue market share by IDC

18.4%

5.3%
5.2%
3.7%
3.6%

2015 2016 2017 2018 2019

#1 in Sales

Worldwide sales force productivity and management applications 2019 revenue market share by IDC

39.2%

11.1%
9.8%
8.8%
5.6%

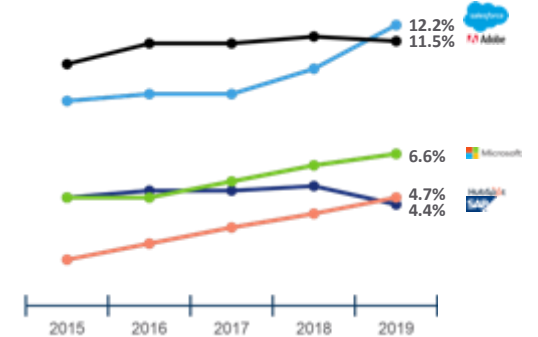2015 2016 2017 2018 2019
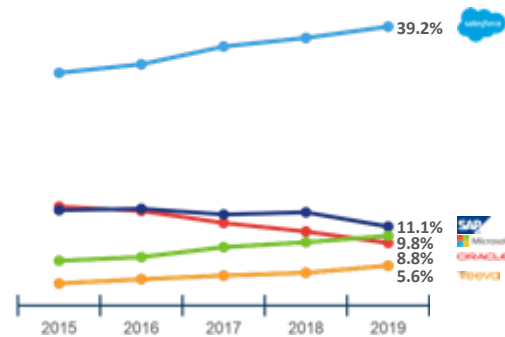
#1 in Customer Service

Worldwide customer service applications 2019 revenue market share by IDC

45%

9.4%
7.9%

2015 2016 2017 2018 2019
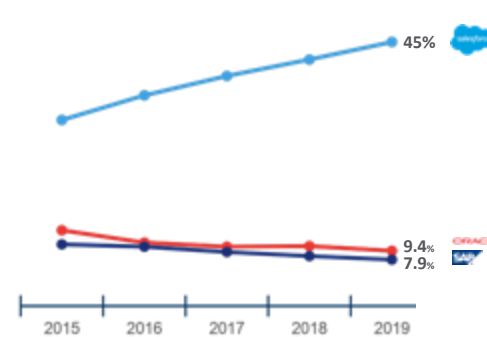
#1 in Marketing

Worldwide marketing campaign management applications 2019 revenue market share by IDC

12.2%
11.5%

6.6%

4.7%
4.4%

2015 2016 2017 2018 2019

Source: IDC, Worldwide Semiannual Software Tracker, April 2020. CRM market includes the following IDC-defined functional markets: Sales Force Productivity and Management, Marketing Campaign Management, Customer Service, Contact Center, Advertising, and Digital Commerce Applications.

35+ COUNTRIES

142 PPMDs[2]

6,500+ PRACTITIONERS

15,000+ CERTIFICATIONS[3]

🏆 ACCOLADES & RECOGNITION

Deloitte is recognized by Gartner, Forrester, IDC, and Kennedy as the best in CRM, industry transformation projects, and the **#1 systems integrator**.

14 times and **nine years in a row**! We have been recognized as a **worldwide Leader in the Gartner Magic Quadrant for #CRM and #CX Implementation Services** 2021.

2021 MAGIC QUADRANT *for* CRM *and* CUSTOMER EXPERIENCE IMPLEMENTATION SERVICES

Figure 1: Magic Quadrant for CRM and Customer Experience Implementation Services

CHALLENGERS | LEADERS

Deloitte
Accenture
IBM
HCL Technologies
Wipro
Capgemini
Cognizant
TCS
Reply
Publicis Sapient
Infosys
NTT DATA
PwC
BearingPoint
Salesforce
Atos
EY

ABILITY TO EXECUTE

NICHE PLAYERS | VISIONARIES

COMPLETENESS OF VISION

As of April 2021   © Gartner, Inc

Source: Gartner (May 2021)

1000+ GLOBAL IMPLEMENTATIONS

9.8 CUSTOMER SATISFACTION
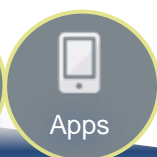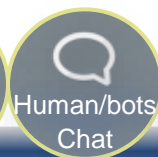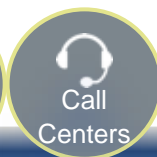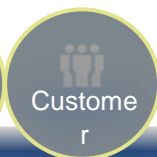
DELOITTE DIFFERENTIATORS

1. Structured and strategic acquisition strategy
2. Digital design capabilities
3. Broad service and product approach

CRM Capability Map

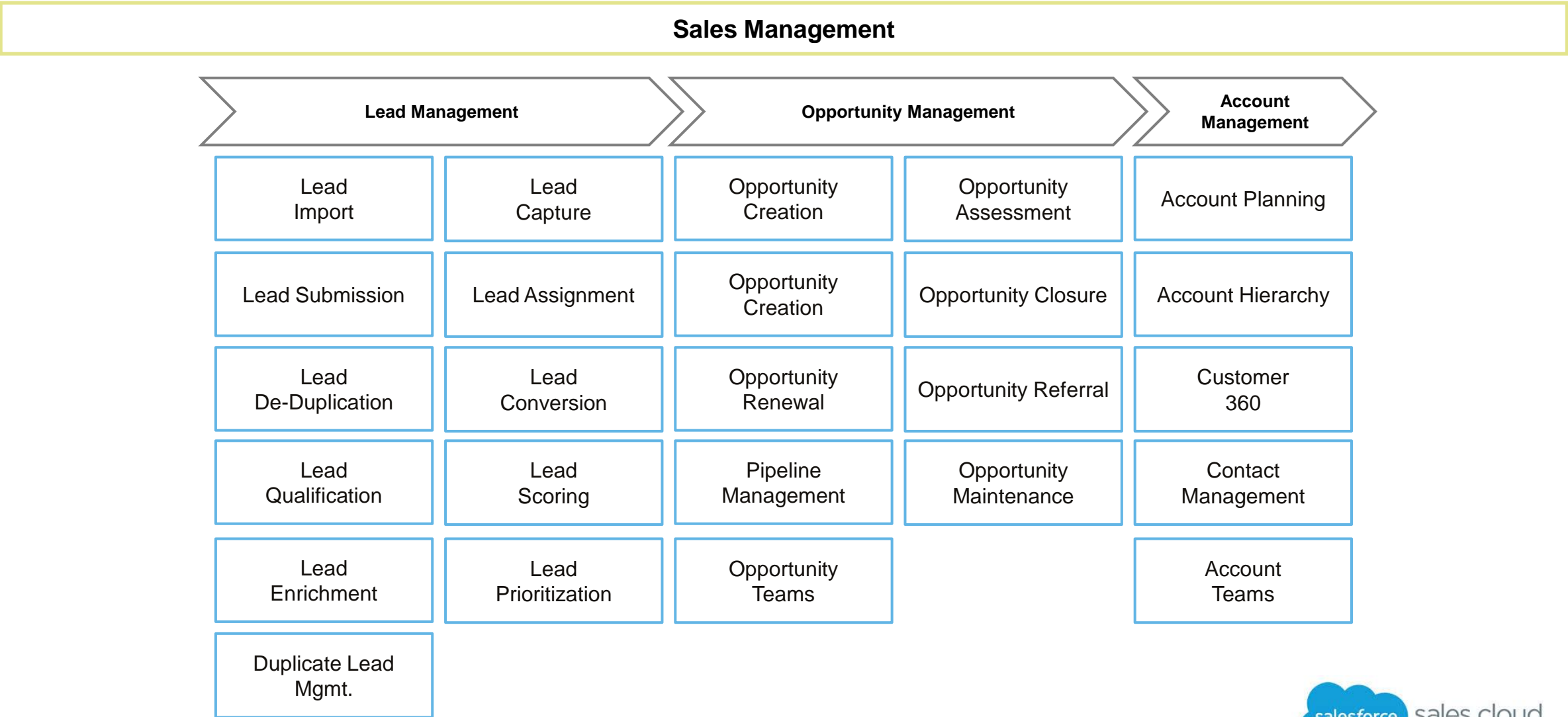*Primary Functional Owner(s)*

Marketing		Sales & Partner Management			Customer Support			Field Service		Support	QA & Compliance	
Demand to Offer	**Market to Lead**	**Recruit to Partner**	**Opportunity to Quote**		**Order to Fulfill**		**Issue to Resolution**	**Monitor to Service**		**Invoice to Cash**	**Quality to Comply**	**Data Gov. & Analytics**
1.1 Market Analysis	2.1 Customer Segmentation	3.1 Partner Access Management	4.1 Lead Assignment & Conversion	4.8 Account Planning & Management	5.1 Quote Conversion	5.8 Customer Training	6.1 Case Creation	7.1 Installed Base Mgmt.	7.7 Consumption & Usage Alerts	8.1 Billing	9.1 Sunshine Act Compliance	10.1 Customer Master Data
1.2 Offer Strategy & Planning	2.2 Campaign Management	3.2 Partner Info. Management	4.2 Opportunity Management	4.9 Sales Forecasting	5.2 Order Creation	5.9 License Distribution Mgmt.	6.2 Channel Integration	7.2 Parts Management	7.8 Predictive Maintenance	8.2 Invoice Management	9.2 Product Quality Complaints Handling	10.2 Reporting & Dashboards
1.3 Offer Catalog Management	2.3 Content Management	3.3 Partner Product & Territory Alignment	4.3 Config. & Bundling	4.10 Customer Specific Pricing	5.3 Order Status Tracking	5.10 Device Registration & Mgmt.	6.3 Case Classification & Routing	7.3 Inventory Management	7.9 Tools Management	8.3 Payments	9.3 Adverse Event Mgmt.	10.3 Identity & Access Mgmt.
1.4 Offer Pricing	2.4 Lead Generation & Nurturing	3.4 Partner Collaboration	4.4 Quote Generation & Approval	4.11 Renewals & Amendments Management	5.4 Contract Management	5.11 Customer Comm.	6.4 Knowledge Management	7.4 Shipping & Receiving	7.10 Time & Expense Tracking	8.4 Real-Time Balance Mgmt.	9.4 Regulatory Reporting	10.4 Advanced Analytics
1.5 Brand Awareness	2.5 Promotions & Events	3.5 Partner Program & Governance	4.5 Discount Management	4.12 Territory Planning	5.5 Warranty / Entitlement	5.12 Return & Recalls Management	6.5 Case Closure	7.5 Scheduling & Dispatch	7.11 Field Visit Report	8.5 Revenue Management	9.5 Safety Signal Detection	
	2.6 Key Opinion Leader Mgmt.	3.6 Deal Registration	4.6 Clinical Sales Support Mgmt.	4.13 Territory Management	5.6 Tender Management	5.13 Template & CFD Mgmt.	6.6 Customer Satisfaction Survey	7.6 Work Order Management	7.12 Certificates & e-Signature	8.6 Tax & Freight		
	2.7 Lead Scoring & Qual.	3.7 Partner Forecasting & Quotas	4.7 eDetailing	4.14 Sales Incentive Mgmt.	5.7 Installation Coordination		6.7 Self-Service Portal Integration					

Market Places · Customer · Employee · Partners · Call Centers · Field Agents · Self Service COM · Direct · Social Care · Human/bots Chat · Aggregators · Apps

Sales Management

Lead Management		Opportunity Management		Account Management
Lead Import	Lead Capture	Opportunity Creation	Opportunity Assessment	Account Planning
Lead Submission	Lead Assignment	Opportunity Creation	Opportunity Closure	Account Hierarchy
Lead De-Duplication	Lead Conversion	Opportunity Renewal	Opportunity Referral	Customer 360
Lead Qualification	Lead Scoring	Pipeline Management	Opportunity Maintenance	Contact Management
Lead Enrichment	Lead Prioritization	Opportunity Teams		Account Teams
Duplicate Lead Mgmt.				

Service Management

Channels	Contact Delivery	Case Mgmt.		Knowledge Mgmt.	Field Service Mgmt.
Phone	Omni-Channel Routing	Agent Service console	Create/Update Case	Access Knowledge	Return Order
Chatbot	Computer Telephony Integration	Case Closure	Next Best Action	Author and Publish Articles	Work Order
Live Agent - Chat	Transfer	Service Entitlements	Task/Activity Mgmt.	Article Recommendation	
Portals- Web		Case Comments	Approval Process	Archive Articles	
Social Media		Case Escalation Rules	Assignment Rules	Import Articles	
Mobile App		Macros	Auto Response Rules		
SMS / Text		Duplicate Case Management	Einstein Case Classification		
Email		Case Handle Time Summary			

salesforce service cloud

MARKETING CLOUD: CAPABILITY MAP

1.1 Brand Awareness	1.2 Customer Segmentation	1.3 Campaign Management	1.4 Content Management	1.5 Lead Generation & Nurturing		1.6 Reporting & Dashboards	1.7 Customer Data Platform
Web Advertising	Customer Preferences	Campaign Testing & Optimization	Email Template Creation	Lead Capture (forms)	Lead Nurturing Programs	Basic Campaign Engagement Metrics	Unified Customer Profile
Social Advertising	Response Management	Email Message Creation	Email Personalization	Landing Pages	Triggered Campaigns (Auto responders)	Monitor & Track Email Deliverability	Data Ingestion and Transformation
Social Publishing	Custom Preference Center	Basic Campaign Calendar	Embed Predictive Content	**Journey Builder**	Link Redirect & Tracking	Campaign Influence Attribution	Real Time Segment Analysis & Construction
Ad Studio	Basic Demographic Segmentation Selection	Omni-Channel Campaign Orchestration	Content Testing & Optimization	Progressive Profiling	Send Email Tracking	Multi-touch Attribution	Identity Resolution
Einstein	Predictive Modeling	Distributed Marketing	Digital Asset Management	Gated Content	Sales Enabled Marketing (Sales Email)	Campaign Response Reporting	Consent Management
Social Studio	Consent Management (GDPR, etc.)	Marketing Planning	Web Personalization	Lead Validation, Enhancement, & Deduplication	Surveys	Full-funnel Lifecycle Reporting	Multi-Channel Campaign Analysis
SMS	Basic Segmentation Selection	Account Based Marketing		Marketing Sales Insights (Sales Intelligence)	Manual Lead Capture (csv uploads)		
Social Sharing	Contact Builder	Interaction Management (Decision Engine)		Multi Tenant Lead Capture (Partitions / Workspaces)			

salesforce marketing cloud

Salesforce Einstein Analytics

https://sforce.co/3xTsoJ1