Introduction to Salesforce
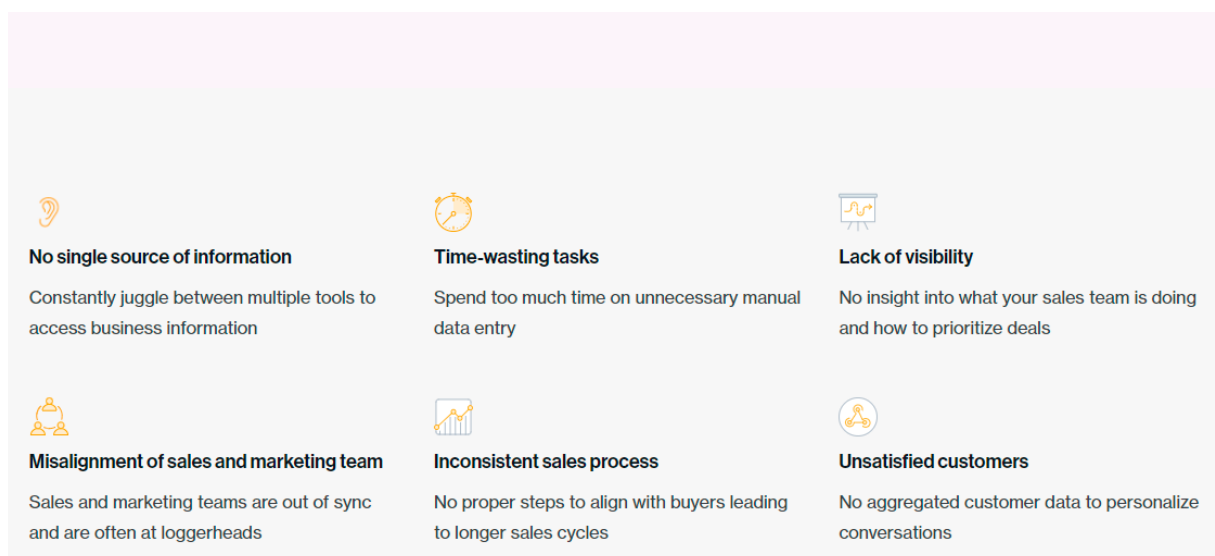
CRM (Customer Relationship Management) is a kind of software that stores customer contact information like name, address, age, phone number. It also keeps tracks of customer activity like website visits, numbers of outgoing and incoming phone calls, email, and more.

Apart from that CRM software also helps the sales staff to close deals faster, retain existing customers and to discover new potential quickly. It also simplifies marketing and sales processes.

CRM software keeps track of customers' interests and helps organizations in modifying their products and services according to the customers' needs.

What is the right time to adopt a CRM?

When you introduce a CRM, it becomes an integral part of your business

No single source of information
Constantly juggle between multiple tools to access business information

Time-wasting tasks
Spend too much time on unnecessary manual data entry

Lack of visibility
No insight into what your sales team is doing and how to prioritize deals

Misalignment of sales and marketing team
Sales and marketing teams are out of sync and are often at loggerheads

Inconsistent sales process
No proper steps to align with buyers leading to longer sales cycles

Unsatisfied customers
No aggregated customer data to personalize conversations

What are the types of CRM systems?

On-premise CRM vs cloud-based CRM

One of the first choices that a business has to make is choosing between an On-permise and a cloud CRM system. An On-premise CRM system typically involves the business having to set up the complete back-end infrastructure and foot the bill for maintenance and upgrade, on top of the licensing cost for the actual software.

A cloud CRM system is often the most preferred option for businesses as it is accessible easily through any browser, allowing for quicker deployments and usage. Other added benefits include no maintenance or upkeep costs, greater accessibility to your data when needed and the flexibility to scale up or down with ease.

Industry-specific CRM software

There are multiple vendors in the market who offer CRM software that are specifically built from the ground up to cater to the niche requirements of different industries. Dedicated CRM software are available for industry verticals like real-estate, healthcare, insurance, financial services, media agencies, hospitality and more.

All-in-one CRM solutions

The most popular cloud CRM offerings tend to be these all-in-one CRM solutions that are robust, extremely customizable and integrate with a wide range of popular business software to provide a 360 degree view of your customers. They are feature-rich, secure and easy to use, allowing businesses of different sizes and from across different industries to leverage effectively and see an immediate positive impact on their sales operations.

Legacy Platforms:

Salesforce is a cloud-based Customer Relationship Management (CRM) software for managing customer relationships and integration with other systems. This SaaS tool helps to create custom solutions for marketing, sales, services and ecommerce as per business requirements.

Why Salesforce?

Here, are prime reasons for using Salesforce CRM:

- It is a complete feature-rich solution for marketing, sales, service, partner management, and community management.
- Salesforce data is stored in the cloud so your team can use it from anywhere in the world with the help of an Internet connection.
- It caters to the needs of small as well as medium to large organizations.
- Salesforce works on a pay as you go, model so there are no overhead costs.
- Increase customer loyalty, retention, and satisfaction
- Accelerates sales productivity
- Salesforce can easily integrate with 3rd party apps.
- Increase the growth of your business
- Continuous optimization of campaigns can be done based on the market response and closure interaction with channel partners.

Features of Salesforce

- **Marketing and sales lead**: Helps you to measure customer engagement by tracking email activities and convert them to customers.
- **Contact management**: With the help of this feature you can pull your customer's data like activity history, frequent contacts, customer communications, etc.
- **Opportunities and quotes**: Helps vendor to create opportunity and quote.
- **Build and run innovative apps:** You can build, scale and manage apps
- **Analytics:** It allows you to access the data, create dashboards and perform analysis
- **Email integration:** It provides integrations devoted to customer service, support and customer experience
- **Communities for sales:**– Online community software that enables companies to connect customers, partners and employees with each other
- **Salesforce Engine:** This feature focuses on making personalized contact with a customer for various campaigns designed by the marketing team
- **Sales Collaboration:** This feature helps you to address customer queries and feedback
- **Sales Performance Management:** It offers a metric-based goal setting and helps you to get feedback & rewards for the sales team.
- **Lead Management:** This feature helps you to tracks the leads that are in progress
- **Territory Management:** This feature allows you to create multiple territory models. You can also preview them before rollout, and helps you to optimize and balance territories
- **Partnership management:** This feature allows you to build communities with partners and help them to share objectives, goals, and activities
- **Workflow and Approvals:** The interface provides simple drag and drops option
- **Files Sync and Share:** This feature provide the sales team the power to share various files and update them instantly
- **Reports and Dashboards:** Dashboards and reporting feature offers a real-time picture of the business at a glance
- **Sales Forecasting:** This feature allows you are getting a real time view of the forecast of a sales team

Salesforce Products:

1. Sales Cloud

Sales Cloud, one of the most popular Salesforce products refers to the "sales" module in salesforce.com. It is about identifying, selling, and managing your prospects and customers to reach your sales objectives. It includes Leads, Accounts, Contacts, Contracts, Opportunities, Products, Price books, Quotes, and Campaigns.

2. Service Cloud

Service Cloud is a Salesforce application to support every customer, anytime, anywhere. Salesforce Service Cloud is the world's #1 customer service solution which provides agents the tools to quickly manage customer cases using consoles, communities, knowledge bases, collaboration, social service and multichannel support features.

3. Marketing Cloud

Salesforce Marketing Cloud was previously known as ExactTarget, which is the digital marketing arm of the Salesforce product family. This is one of most sought-after Salesforce products by digital marketers that enables them to create personalized, one-to-one email communications to drive better customer engagement and marketing ROI (Return On Investment).

Salesforce Marketing Cloud (ExactTarget) helps build better customer journeys and enhance customer engagement with a brand across channels outside of email as well including web, mobile, social and ads.

4. Community Cloud

Community cloud is a cloud service model that provides a cloud computing solution to a limited number of individuals or organizations that is governed, managed and secured commonly by all the participating organizations or a third party managed service provider. In a community cloud, infrastructure is shared by several organizations and supports a specific community that has shared concerns (e.g. mission, security requirements, and policy or compliance considerations). When organizations share a computing infrastructure within the same community it is termed as community cloud.

5. Analytics Cloud

Cloud analytics is a type of cloud service model where data analysis and related services are performed on a public or private cloud. Cloud analytics can refer to any data analytics or business intelligence process that is carried out in collaboration with a cloud service provider.

6. App Cloud

Application Cloud is an application program that functions in the cloud, with some characteristics of a pure desktop app and some characteristics of a pure Web app. A desktop app resides entirely on a single device at the user's location (it doesn't necessarily have to be a desktop computer). A Web app is stored entirely on a remote server and is delivered over the Internet through a browser interface.

7. IoT Cloud

IoT (Internet of Things) is a hot topic among the Salesforce Products today which is going to provide a lot of opportunities with a lot of challenges. IoT is a giant network of connected things. It's a connection between people-thing, thing-thing, and thing –people. IoT is the technology which connects the people and all the possible things in the world to make human life easier.

Salesforce IoT Cloud mainly focuses on transforming connected devices into useful customer data. The platform uses the data harvested from devices to enrich the customer interactions proactively in real time.

Core Architecture of Salesforce:
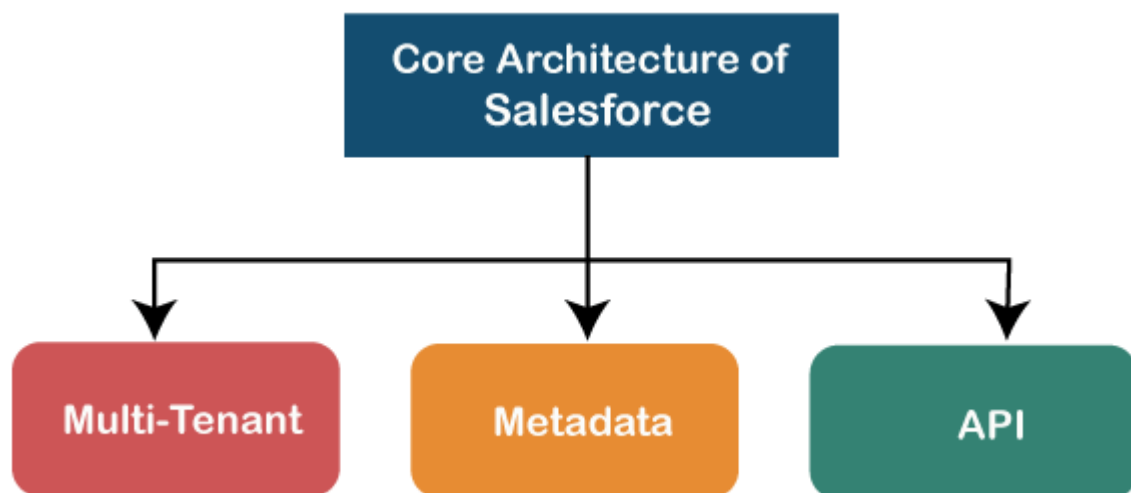
Multi-Tenant Layer

Salesforce architecture is so popular because of its **multitenancy**. *The multitenant architecture means* **one common application for multiple groups or clients**. In such architecture, multiple clients use the same server, but their oaks are isolated from each other. It means the data of one client is secure and isolated from other groups or clients.
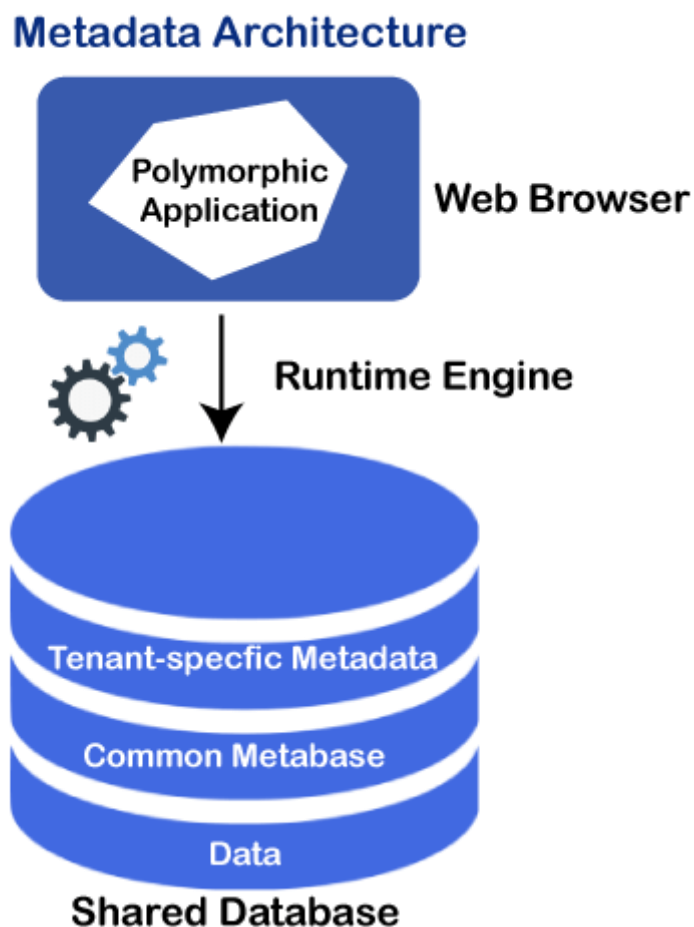
Because of multitenancy, any developer can develop an application, upload it on the cloud, and easily share it with multiple clients or groups. Multiple users share the same server and applications, hence it is very cost-effective. In salesforce, because of this multitenant architecture, all customers' data is saved in a single database.

Metadata

The Salesforce platform follows the meta-data development model. The metadata means data about the data. Salesforce stores the metadata in the shared database along with the data. It means it stores the data as well as what data does.

As we can see in the below diagram, the tenant-specific data ensures that the common data is only shared with one tenant, not with another tenant or group. This ensures the security of the data even in the shared database.

The security issues get resolved with the multitenant architecture because all data is stored on different levels in the form of metadata, i.e., data above data.

Metadata Architecture

Polymorphic Application — Web Browser

Runtime Engine

Tenant-specfic Metadata

Common Metabase

Data

Shared Database

API Services

The salesforce metadata-driven model allows the developers to create their applications easily with the help of various tools. But sometimes developers need some more functionalities for their apps to make some modifications.

To make such modifications, salesforce provides a powerful source of the APIs. These APIs helps the developers to customize the Salesforce mobile application. These APIs allows the various bits of programming to interface with each other and trade data. Without knowing many details, we can connect our apps with other apps.

The API provides a simple but powerful, and open way to programmatically access the data and any app running on the salesforce platform. These APIs helps the developers to access apps from any location, using any programming language that supports Web services, **like <u>Java</u>, <u>PHP</u>, <u>C#</u>, or <u>.NET</u>**.

<u>Customer 360:</u>

Salesforce Customer 360 Data Manager is an Integration tool developed by Salesforce. It can collect all customer data from Salesforce/other third-party applications and present a unified view of the customer.

The Salesforce ecosystem has multiple products used by different teams within the organization. Customer data is often not shared between teams/departments, causing Information Silos.

Customer 360 is designed to sit in the middle of this ecosystem.

<u>Salesforce Editions:</u>

Salesforce Essentials Edition

Preferred by: Small Businesses

Essentials Edition Costing: $25 USD Per User, Per Month

Salesforce Essentials Edition offers a ready-to-go platform for small businesses to manage and grow their business effectively. The businesses can leverage easy-to-use UI and intuitive walkthrough guides to customize and get started with their deployment.

Salesforce Essentials Edition Feature List

- Customizable Sales Process
- Lead Management
- Multi-Channel Communication
- Full Offline Mobile Functionality
- Automated Routing
- Email Integration
- Ticket Management
- AppExchange and many more.

Salesforce Professional Edition

Preferred by: Small & Medium-Sized Enterprises

Professional Edition Costing: $75 USD Per User, Per Month

The professional edition has been designed for businesses who demand a full-featured CRM functionality to manage their business. The businesses can conveniently administer their entire sales cycle with salesforce professional edition.

Salesforce Professional Edition Feature List

- Comprehensive Lead Management
- Campaign Management
- Mass Emails
- Quotes and Orders
- Custom Dashboards
- Custom Reports
- Case Management
- Process Builders, and more.

Salesforce Enterprise Edition

Preferred by: Large & Complex Businesses

Enterprise Edition Costing: $150 USD Per User, Per Month

In addition to the features offered by Professional Edition, Enterprise edition additionally helps large businesses to automate their complex business processes using workflow and approvals. This edition offers advanced customization and management tools to support large-scale deployments. Additionally, Enterprise edition also includes access to Salesforce APIs, so that the businesses can effortlessly integrate with back-office systems.

Salesforce Enterprise Edition Feature Lis

- Territory Management
- Salesforce APIs
- Workflows & Approvals
- Sales Console App
- Advanced Report Types
- Unlimited profiles and roles per org
- Unlimited processes and flows per org
- Lead Registration, and more.

Salesforce Unlimited Edition

Preferred by: Large Business (More than 1000 users)

Unlimited Edition Costing: $300 USD Per User, Per Month

As the name suggests, this Salesforce service cloud unlimited edition offers access to countless online training, 100+ admin services, and premier support. With salesforce unlimited edition, the businesses can build unlimited custom apps and tabs to tailor Salesforce as per their convenience and business requirements.

Salesforce Unlimited edition, with its comprehensive features, presents new levels of platform flexibility to manage and share information on demand. Additionally, the admins can gain access to multiple sandboxes for development and testing with the Unlimited edition of the Sales Cloud.

Salesforce Unlimited Edition Feature List

- Developer Pro Sandbox
- Workflow & Approvals
- Web Services API
- Increased Storage Limits
- Unlimited Custom Apps
- Full Mobile Access
- 24*7 Toll-free support

Apart from the above four primary sales cloud editions, Salesforce offers one exclusive edition for the developers, which lets them extend the power of Salesforce to build modern and unique mobile and enterprise applications.

Salesforce Developer Edition

Preferred by: Professional Developers

Salesforce Developer Edition Pricing: NA

Apart from providing access to many of the features available in Enterprise Edition, the Developer edition offers its users (mostly developers) with access to the Lightning Platform and Salesforce APIs. It offers the developers with the flexibility to extend Salesforce, integrate with other applications, and develop new tools and applications.

SF does not provide any technical support for this edition but the users can ask for help from the developer community by registering for the Lightning Platform developer

website.(opens in a new tab)

Salesforce Licenses:

Licenses are divided into 3 types.

1)User license

2)feature license

3)Permission set license