

Salesforce SFA



“Since deploying Salesforce, we’ve been within 2% of our sales forecasts, giving us companywide visibility that’s fine-tuned with pinpoint accuracy. Salesforce’s instant and constant visibility into sales has made us extremely agile and efficient.”

— Polycom

The World’s Most Popular Sales Solution

Salesforce.com’s flagship Salesforce SFA solution consistently drives more sales success than any other application. High user adoption, a complete suite of tools, and powerful customization to support any sales process make it the only choice for sales reps, managers, and executives looking for success. Part of the number-one on-demand customer relationship management (CRM) solution, Salesforce SFA is used by companies around the world to help grow revenues, increase customer satisfaction, and reduce expenses.

All the Sales Functionality You Need. None of the Headaches.

Only salesforce.com offers an on-demand solution that meets the varied needs of everyone from small businesses to large, global organizations. Salesforce SFA provides your sales team with a complete customer view that is shared with support and marketing in real time, so you can track and optimize your pipeline and ultimately close more deals.

- ❖ **Loved by reps.** Sales reps want solutions that make their jobs easier, not harder. With fast, easy access online, offline, or via mobile devices; integration with popular tools like Microsoft Office and Outlook; and a user interface rated “simple and intuitive” by PC Magazine, Salesforce SFA is the one sales solution every rep will love and use.
- ❖ **Critical for managers.** Managers need the right tools to gain visibility into their sales reps’ activities and pipelines. With powerful opportunity management, forecasting, and boundless customization capabilities, sales managers can be confident they are maximizing team productivity.
- ❖ **Trusted by executives.** Executives need fast, accurate answers to critical business questions. With Salesforce SFA’s unique customizable analytics, executives get real-time answers and business insight with a single click.

The award-winning Salesforce SFA solution offers more features, more powerful customization, easier integration, and the best end-user experience. And best of all, thanks to our on-demand model, it can all be deployed immediately around the globe, freeing you from traditional CRM software and its hidden costs, high failure rates, unacceptable risks, and protracted implementations.

Salesforce SFA Features: The Details

Lead management. Managing leads effectively and optimizing lead flow across sales and marketing are critical to achieving sales success. With Salesforce, you can track prospect inquiries and seamlessly route qualified leads to the right people so sales reps get instant access to the latest prospects and leads are never dropped or lost. Security controls let you give reps access to leads in their own territories only and to manually share specific leads with other users.

Opportunity management. Opportunity management enables sales teams to work together to close deals faster by providing a single place for updating deal information, tracking opportunity milestones, and recording all opportunity-related interactions. Salesforce can be customized to fit your internal sales methodologies and processes, making it easier for your managers to monitor their sales pipelines.

Global forecasting. Salesforce SFA’s global forecasting capabilities give organizations clear visibility into their sales pipelines. Accurate, timely forecasts of revenue and demand help sales close more deals, bring in higher profits, and align expenses with revenue growth. Forecasting also gives companies critical visibility into future product and service demand trends.

Territory management. With the territory management capabilities in Salesforce, you can easily define, administer, analyze, and change sales territories to match your sales organization, no matter how complex it is or how frequently it evolves.

Customizable forecasting. Global, customizable forecasting capabilities in Salesforce give organizations clear visibility into their sales pipelines. Accurate, timely forecasts of revenue and customer demand help sales close more deals, bring higher profits to the company, and align expenses with revenue growth. Forecasting also gives companies critical visibility into future product and service demand trends.

“Salesforce has changed the way we do business. Our sales team really relies on it.”

— The Wall Street Journal

“Our business is sales, and Salesforce has been an integral part of our growth. The visibility that it provides is invaluable.”

— InterActiveCorp

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

Approvals and workflow. Salesforce provides workflow automation capabilities that you can easily customize to better manage your organization's unique sales processes. The result is greater control over routine activities, the elimination of redundant tasks, and adherence to your approval processes.

Account and contact management. Salesforce gives your entire company a 360-degree view of each of your customers, enabling you to acquire deep knowledge of every account and contact, facilitate collaboration across your organization, and build and maintain strong, lasting customer relationships.

Activity management. Coordinating customer-facing activities and events is a critical part of closing business and managing customer relationships. Salesforce's activity management capabilities help keep your reps organized and working together so your customers receive the attention they need.

Product catalog. Salesforce enables organizations to manage even the most complex product catalogs with ease. You can easily maintain and secure even large catalogs and multiple price books centrally for increased consistency while giving your teams easy access to the precise product and pricing information they need.

Document management. Salesforce provides instant access to the most recent versions of the sales and marketing documents and materials your teams need—all in one place. Salesforce acts as your on-demand resource for critical business materials by providing a common document repository to enable consistent and effective communications from anywhere in the world.

Contract management. Salesforce's contract management capabilities seamlessly integrate back-office financial functionality into your front office. As a result, your organization is able to effectively manage the entire customer lifecycle—from a contract's approval through its renewal—to enhance profits.

Email templates. Why should salespeople start with a blank page when writing customer and prospect emails? HTML email templates that sales reps can personalize are big time-savers for reps and also ensure that even individual communications are accurate and on message. Automatic tracking helps reps know when to follow up.

Asset management. Knowing precisely which products your customers have purchased and installed is essential to world-class sales and service. With Salesforce, you can track which of your products each of your customers has purchased. Plus, you can broaden your view of sales opportunities by also tracking which competing products they are using.

Partner management. Salesforce delivers unparalleled visibility into your company's entire sales pipeline—including both direct and indirect channels. Salesforce PRM, salesforce.com's on-demand solution for managing your channel partner relationships, is seamlessly integrated with Salesforce SFA. The result: one pipeline and one forecast across all channels.

Reports and dashboards. With customizable reports and dashboards, sales managers and executives have instant access to the real-time data and analysis they need to run the business effectively. Easy-to-use sales analytics tools help managers analyze sales pipelines, perform win-loss analyses, create historical trend analyses, and more. Dashboards pull it all together, providing instant access to a consolidated, real-time view of sales data.

Data quality management. Maintaining data quality is critical, especially with customer and prospect information. With Salesforce, you can be certain your customer database has valid data and is free of duplicates.

Mobile solutions. Mobile CRM capabilities from Salesforce keep sales reps connected while they are away from the office. With support for disconnected laptops, wireless email devices (such as the BlackBerry), and wireless PDAs, traveling reps are never out of touch with their critical data.

Microsoft Outlook, Word, and Excel integration. Workers don't have to toggle back and forth between Salesforce SFA and Microsoft's popular productivity and email tools. Our tightly integrated and easy-to-use solutions allow users to work more productively in the critical applications they use most.

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