**CRM Fundamentals Assignment**

**1. Benefits for local grocer**

* Monitor regular customers
* Target customers
* Identifying potential customers
* Manage customer details
* Responsive to customer need
* Time saving
* Marketing automation
* Better service
* Quick and efficient responses
* Cross selling
* Up selling
* Manage vendors
* Automation
* Analyzing, reporting, auditing
* Better service to customers
* Better internal communication
* Optimize marketing

**2. A. major features available in marketing cloud**

* Crm and cross-channel integration
* Comprehensive, real-time tracking and reporting
* Mms and sms
* Goal setting
* Tracking
* Predictive intelligence
* Customer journey management
* Social marketing
* Real time analytics

**2. B. why marketing activities conducted by organizations**

## Getting word out

## Higher sales

* Company reputation
* Healthy competition

**2. C. marketing activities**

## Social media

* Analytic
* Voice and brand messaging
* Content creation
* Search engine optimization
* Conversion rate optimization

**2. D. how these benefit relevant marketing activities conducted by organizations**

* Advertising
* Exploring and expanding to new markets
* Price reduction
* Adding new features
* Packaging
* Changing customer consumption habits
* Special promotions
* Heightening interest

**3. Calamos investments**

* How were marketing activities performed prior to using marketing cloud?

Emails and in person

* What made them switch to marketing cloud?

A trusted source of information. Right message to right individual at right time. Customization with personal touch.

* How has the switch impacted their marketing activities?

Double digit increase in email campaign, click rates

* How do they now measure the success / failure of their marketing activities?

More personal one to one relationship. Better communication and understanding the behavior of customer for more accurate predictive recommendations.

Average industry time for page view - 4 min calamos - 6min

* Which features of marketing cloud, in your opinion has, has led to transformation within the selected organisation?
  + Crm and cross-channel integration
  + Comprehensive, real-time tracking and reporting  
    tracking
  + Predictive intelligence
  + Customer journey management

**4. Banking and finance**

They should use a combination of all three sales, service and marketing cloud

* **Sales**- it includes leads, accounts, contacts, contracts, opportunities, products, pricebooks, quotes, and campaigns
* **Service**- it includes accounts, contacts, cases, and solutions. It also encompasses features such as the public knowledge base, web-to-case, call center, and the self-service portal.
* **Marketing cloud**- deliver exceptional experiences across email, mobile, advertising, the web, and more by creating personalized, cross-channel journeys.

**License recommended-**

* **Customer portal—enterprise administration user licenses**

Users with this license can:

Create, read, or update accounts, assets, and cases.

View contacts.

View custom objects and run reports depending on their permissions.

Access salesforce crm content if they have a salesforce crm content feature license or the appropriate permissions.

* + Create update delete bank accounts, customer objects loan objects
  + As a bank/finance employee we can audit the records
* **Website authenrication license**

Platform portal users have the authenticated website license, which is designed to be used with force.com sites. It gives named sites users unlimited logins to your platform portal to access customer support information.

* + For any type of authentication required in banks like net banking, net banking authenticaton
* **Sales froce standard user license**

Designed for users who require full access to standard crm and force.com appexchange apps. Users with this user license are entitled to access any standard or custom app.

Each license provides additional storage for enterprise, unlimited, and performance edition users.

* + For crm
* **Chatter free license**

The chatter free license is for users who don’t have salesforce licenses but need access to chatter. These users can access standard chatter items such as people, profiles, groups, and files, but they can’t access any salesforce objects or data. Chatter free users can also be chatter moderators.

* + Call support, email support