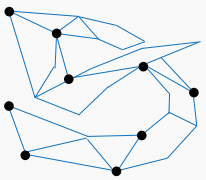




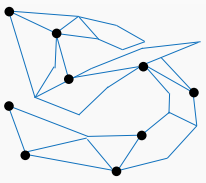
Data Application Lab

CRM and Salesforce



Agenda

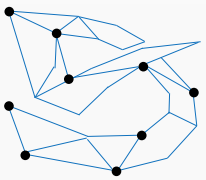
- CRM
- Traditional Sales Management
- Market and Key Provider
- Salesforce
- Data Module
- Example
- Job Opportunities and Certificates



CRM and the 4th Industrial Revolution



Customer
Relationship
Management



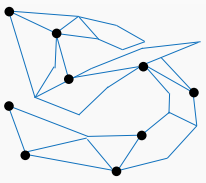
Salesforce CRM Reference Videos

- [What is CRM](#)
- [What is Salesforce](#)
- [Salesforce Essential](#)
- [Boost Productivity](#)



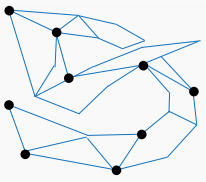
Salesforce Customer 360



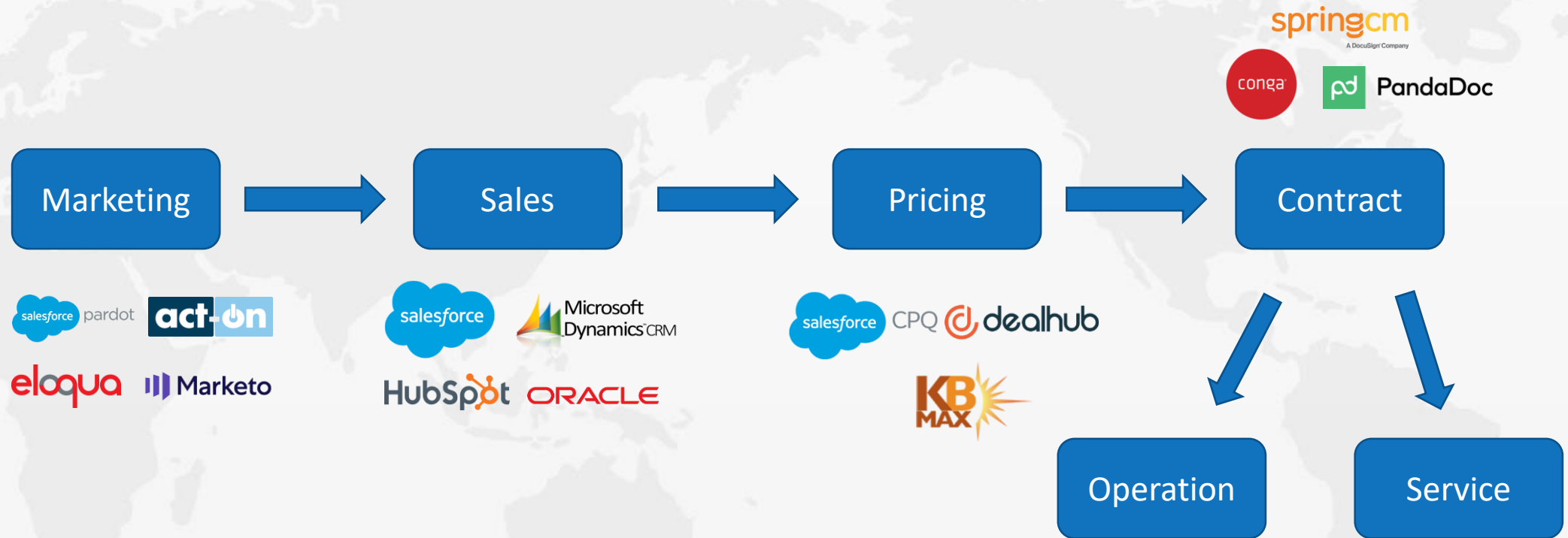


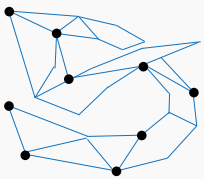
Salesforce Products

- Sales Cloud
- Service Cloud
- Marketing Cloud
- Community Cloud
- Analytics Cloud
- App Exchange/App Platform
- Commerce Cloud
- IoT Cloud



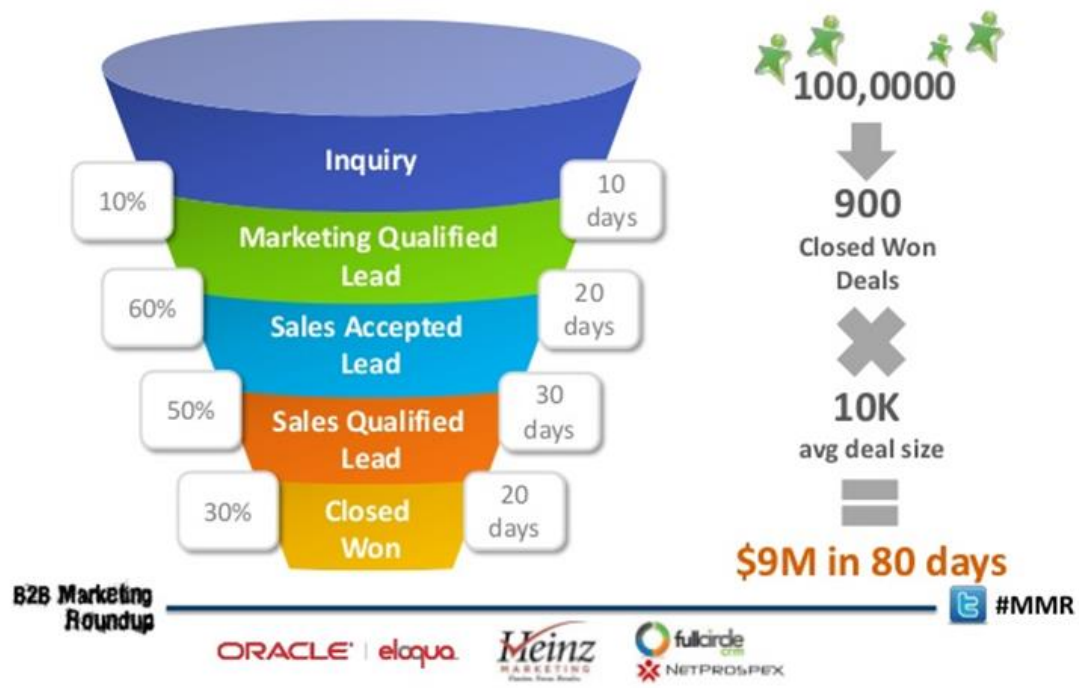
CRM Model



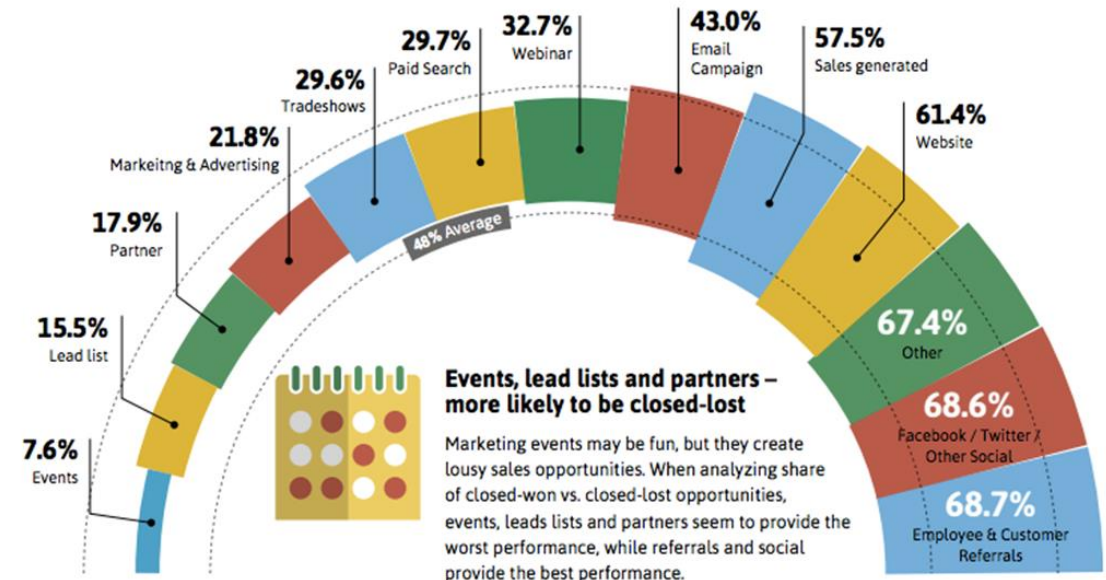


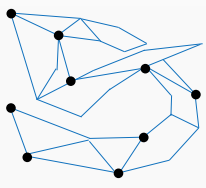
Sales and Marketing Management

Maximizing the Value of the Funnel



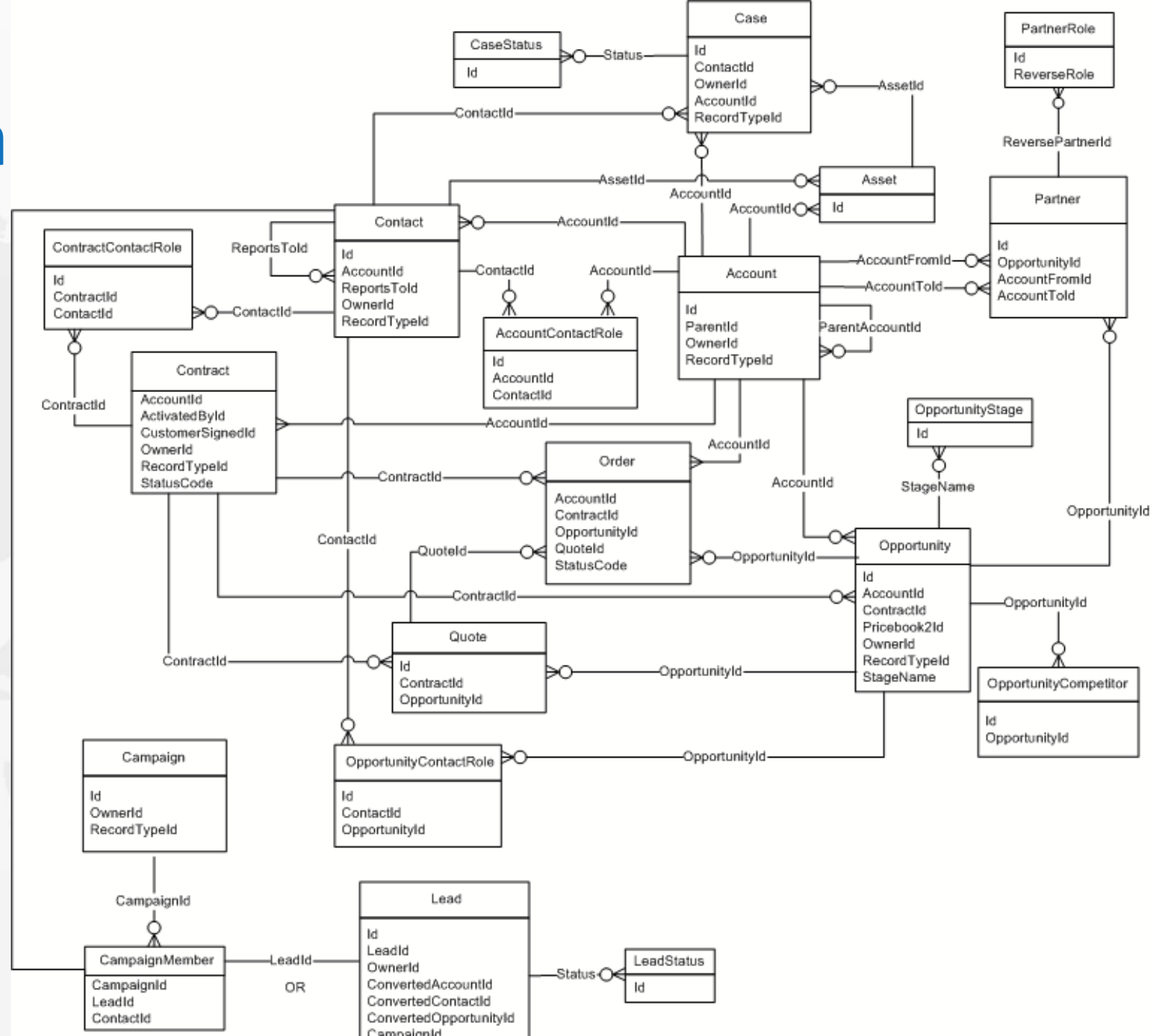
Closed-won vs. Closed-lost Opportunities Ratio





Salesforce Data Model

- Accounts
- Contacts
- Opportunities
- Campaign
- Tasks
- Contracts(Optional)
- Reports
- Dashboard





Username

Password

Log In

☐ Remember me

[Forgot Your Password?](#)

[Use Custom Domain](#)

[Not a customer?](#)

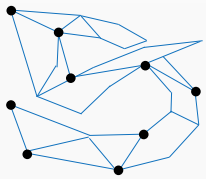
[Try for Free](#)

Build highly customizable apps anywhere.

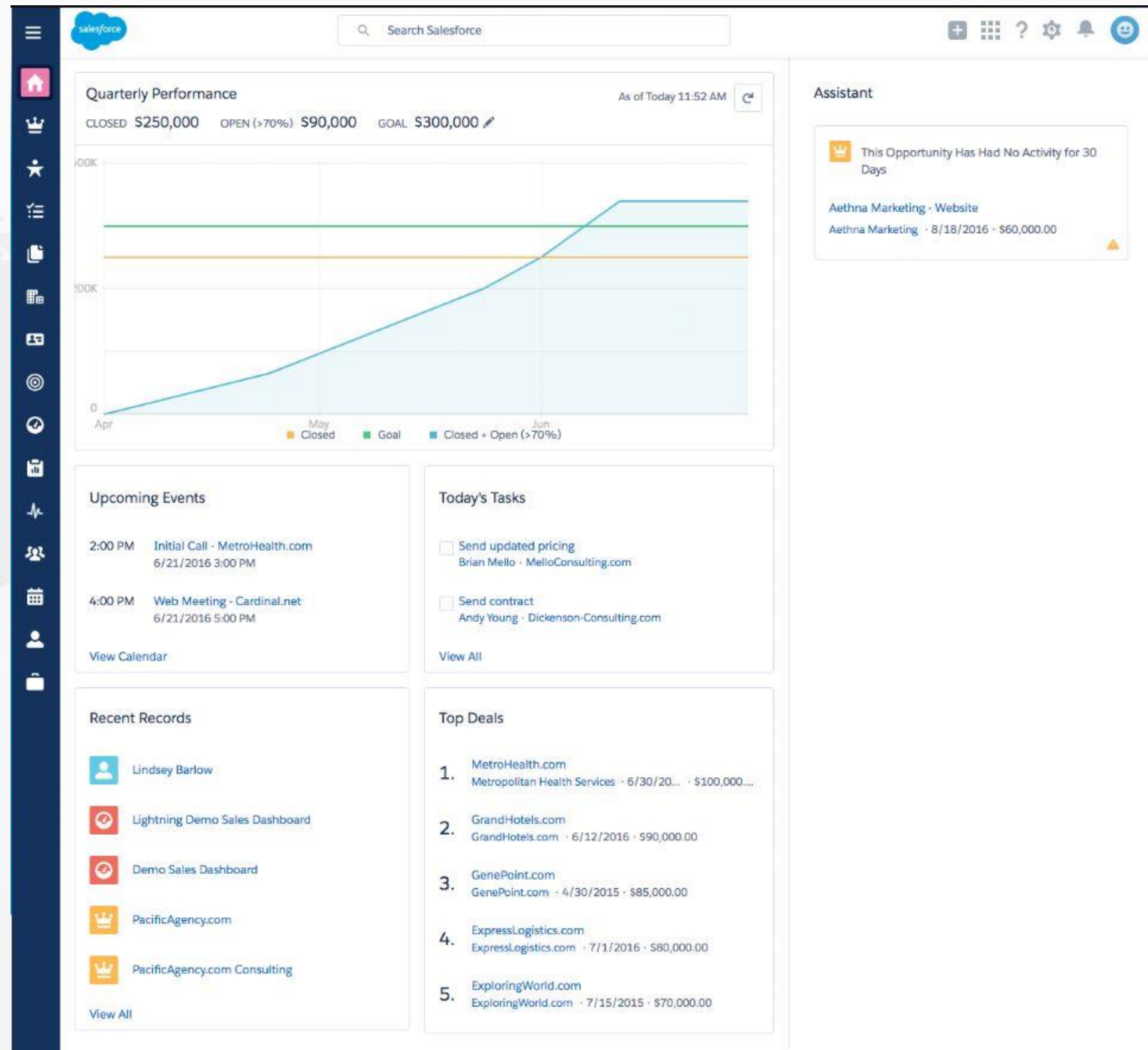
Empower developers to create secure apps with open-source
Lightning Web Components.

[READ THE ARTICLE](#)





Home



Account

salesforce 16 Search... Lindsey Barlow Setup Help Marketing

Home Chatter Campaigns Leads Contacts **Accounts** Opportunities Reports Dashboards +

Create New... Recent Items: ExpressLogistics.com, Lindsey Barlow, Josh Davis, Babara Levy

ExpressLogistics.com

Account Detail

Phone: (503) 421-7800
Fax: (503) 421-7801
Website: <http://www.express&i.net>
Employees: 12,300

Shipping Address: 620 SW 5th Avenue Suite 400, Portland, Oregon 97204, United States

2015 1:41 PM Last Modified By: Lindsey Barlow, 4/14/2015 11:25 AM

Opportunities

Action	Opportunity Name	Stage	Amount	Close Date
Edit Del	ExpressLogistics.com	Closing	\$80,000.00	7/1/2016

Contacts

Action	Contact Name	Title	Email	Phone
Edit Del	Josh Davis	Director, Warehouse Mgmt	j.davis@express&i.net	(503) 421-7800
Edit Del	Babara Levy	SVP, Operations	b.levy@express&i.net	(503) 421-7800

Contact Roles

No records to display

Partners

No records to display

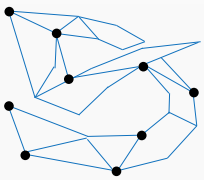
Open Activities

Action	Subject	Name	Related To	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Closing check-in	Babara Levy	ExpressLogistics.com	✓	6/27/2016	Not Started	Normal	Lindsey Barlow

Activity History

Action	Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Send Contract	Babara Levy	ExpressLogistics.com	✓	5/16/2016	Lindsey Barlow	6/21/2016 7:48 AM
Edit Del	Web Meeting	Babara Levy	ExpressLogistics.com		4/11/2016 10:30 AM	Lindsey Barlow	6/21/2016 7:48 AM
Edit Del	Initial Call	Babara Levy	ExpressLogistics.com		3/7/2016 9:00 AM	Lindsey Barlow	6/21/2016 7:48 AM

Chat



Account in Lightning

ACCOUNT
ExpressLogistics.com

Type: End Client | Phone: (503) 421-7800 | Website: http://www.expressl... | Account Owner: Lindsey Barlow | Account Site: | Industry: Transportation

RELATED | **DETAILS**

Learn More Using Twitter
Sign in to link a Twitter profile, find people in common, and quickly access recent tweets. [Sign in with Twitter](#)

Opportunities (1) [New](#)

ExpressLogistics.com
Stage: Closing
Amount: \$80,000.00
Close Date: 7/1/2016
[View All](#)

Contacts (2) [New](#)

Josh Davis
Title: Director, Warehouse Mgmt
Email: j.davis@expressl...
Phone: (503) 421-7800

Babara Levy
Title: SVP, Operations
Email: b.levy@expressl...
Phone: (503) 421-7800
[View All](#)

Notes & Attachments (0) [Upload File](#)

ACTIVITY | **COLLABORATE**

[New Task](#) [New Event](#) [Log a Call](#) [Email](#)

Subject

Show: **All Activities**

Next Steps [More Steps](#)

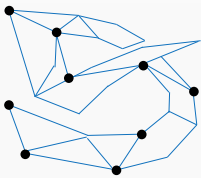
☐ **Closing check-in** Jun 27
Name: Babara Levy
Related To: ExpressLogistics.com

Past Activity

☒ **Send Contract** May 16
Name: Babara Levy
Related To: ExpressLogistics.com

☒ **Web Meeting** 10:30 AM | Apr 11
Start: 4/11/2016 10:30 AM
End: 4/11/2016 11:30 AM

☒ **Initial Call** 9:00 AM | Mar 7
Start: 3/7/2016 9:00 AM
End: 3/7/2016 10:00 AM
[More Past Activity](#)



Contact

Outreach

Contact: Wylie Coyote ~ Sales | x

Secure <https://outreach.my.salesforce.com/003d000002w8svh?srPos=0&srKp...>

[Bizible Touchpoint \[0\]](#) | [Bizible Attribution Touchpoint \[0\]](#) | [AdvocacyActivities \[0\]](#) | [Opportunities \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[5+\]](#) | [Customer Love \[0\]](#) | [Cases \[0\]](#) | [Campaign History \[1\]](#) | [Contact History \[5+\]](#)

Contact Detail

[Edit](#) [Launch Concierge](#)

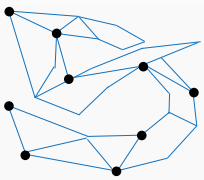
Contact Owner	Manny Ortega [Change]	Account Phone	(727) 403-8090
Account Name	Acme Corp. (TESTDUMMY)	Ext.	510
Name	Wylie Coyote	Phone	(206) 851-8679
Title	Chief Bird Chaser	Mobile	(651) 724-0202
Persona	Marketing	Email	wylie.c@acmecorp.com
Outreach User Type	Prospect (non-user)	Managed By	
LinkedIn Profile	http://LinkedIn.com/gold		
OPS-OptInToNewsletter	<input type="checkbox"/>		
Last Marketing Interaction (Date/Time)	12/27/2017 11:12 AM		

▼ Secondary Contact Vectors

Email - 2	wylie.coyote@acmecorp.com	Twitter
Email - 3		
Email - 4		
Email - 5		

▼ Engagement Panel

Contact Status	Closed - Left Company	Time Zone	PDT
Sequence Active	<input type="checkbox"/>	Do Not Call	<input type="checkbox"/>
Name of Currently Active Sequence	SDR Test	International Contact	<input type="checkbox"/>
Current Sequence Status	active	NO LONGER WITH COMPANY	<input checked="" type="checkbox"/>
Current Sequence Step Number	4	Email Opt Out	<input type="checkbox"/>
Current Sequence Step Type	call	First MKTG Activity Date (Last 30 days)	
Current Sequence Step Due	2/14/2017 5:54 PM	First OR Activity Date / Last	



Contact in Lightning

The screenshot displays the Salesforce Lightning interface for a 'Contact' record. The left sidebar shows the account 'Acme Inc' and a list of related records, including 'Kathryn Thomas' which is highlighted with a red box. The main content area shows the details of Alan Johnson, including his title 'Sale Manager', account name 'Get Cloudy', phone number '(720) 444-1229', and email 'alan@gogetcloudy.com'. The right sidebar shows the 'ACTIVITY' and 'CHATTER' sections.

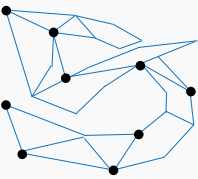
Account: Acme Inc
TYPE: Customer - Direct
TITLE: COO
PHONE: (312) 333-7777
ACCOUNT NAME: Acme Inc
EMAIL: kathy@acmeeast.com

Related Records:
Opportunities (1)
Acme - 50,000 Units
Stage: Prospecting
Amount:
Close Date: 9/30/2015
View All
Cases (0)

Contact: Alan Johnson
Title: Sale Manager
Account Name: [Get Cloudy](#)
Phone(2): (720) 444-1229
Email: alan@gogetcloudy.com
Contact Owner: [Maria Jimenez](#)

Related Records (Main View):
We found no potential duplicates of this contact.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.
Opportunities (1)
[Get Cloudy - 50 StratusX11](#)
Stage: Prospecting
Amount:
Close Date: 8/31/2018
View All
Cases (0)
Campaign History (0)

Activity and Chatter:
New Task, New Event, Log a Call, More
Create a task... Add
Filters: All time • All activities • All types
Refresh Expand All
Next Steps: No next steps. To get things moving, add a task or set up a meeting.
Past Activities: No past activity. Past meetings and tasks marked as done show up here.
Load More Past Activities



Opportunity

salesforce '16

Search... Search

Lindsey Barlow Setup Help Marketing

Home Chatter Campaigns Leads Contacts Accounts Opportunities Reports Dashboards +

Create New... Opportunity ExpressLogistics.com

Recent Items: ExpressLogistic..., Lindsey Barlow, ExploringWorld.com

Show Feed Click to add topics

Open Activities (1) | Activity History (3) | Contact Roles (1) | Campaign Influence (2) | Partners (2) | Stage History (3)

Edit Delete Clone

Lindsey Barlow [Change] Stage Closing

ExpressLogistics.com Close Date 7/1/2016

ExpressLogistics.com Probability (%) 90%

angledCMS Site Amount \$80,000.00

+ Follow Edit New Case New Note

Account Name ExpressLogistics.com Close Date 7/1/2016 Amount \$80,000.00 Opportunity Owner Lindsey Barlow

Log a Call New Task New Event Email

Subject Call Comments Save

Show: All Activities

Next Steps: Closing check-in Jun 27 Name Babara Levy

Past Activity: Send Contract May 16 Name Babara Levy

Web Meeting 10:30 AM | Apr 11 Start 4/11/2016 10:30 AM End 4/11/2016 11:30 AM

Initial Call 9:00 AM | Mar 7 Start 3/7/2016 9:00 AM End 3/7/2016 10:00 AM

More Past Activity

Contact Roles (1)

Babara Levy PRIMARY

Role: Decision Maker Title: SVP, Operations View All

New Task New Event Open Activities Help

Name	Task	Due Date	Status	Priority	Assigned To
Babara Levy	✓	6/27/2016	Not Started	Normal	Lindsey Barlow

Log a Call Mail Merge Send an Email View All Activity History Help

Name	Task	Due Date	Assigned To	Last Modified Date/Time
Babara Levy	✓	5/16/2016	Lindsey Barlow	6/21/2016 7:48 AM
Babara Levy		4/11/2016 10:30 AM	Lindsey Barlow	6/21/2016 7:48 AM
Babara Levy		3/7/2016 9:00 AM	Lindsey Barlow	6/21/2016 7:47 AM

New Contact Roles Help

Account Name	Email	Phone	Role	Primary
ExpressLogistics.com	b.levy@expresslogistics.com	(503) 421-7800	Decision Maker	✓

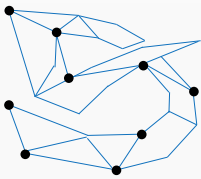
Add to Campaign Campaign Influence Help

	Contact Name	Contact Role	Responded	Primary Campaign Source
angled Seminar-Apr 2015	Babara Levy	Decision Maker	✓	

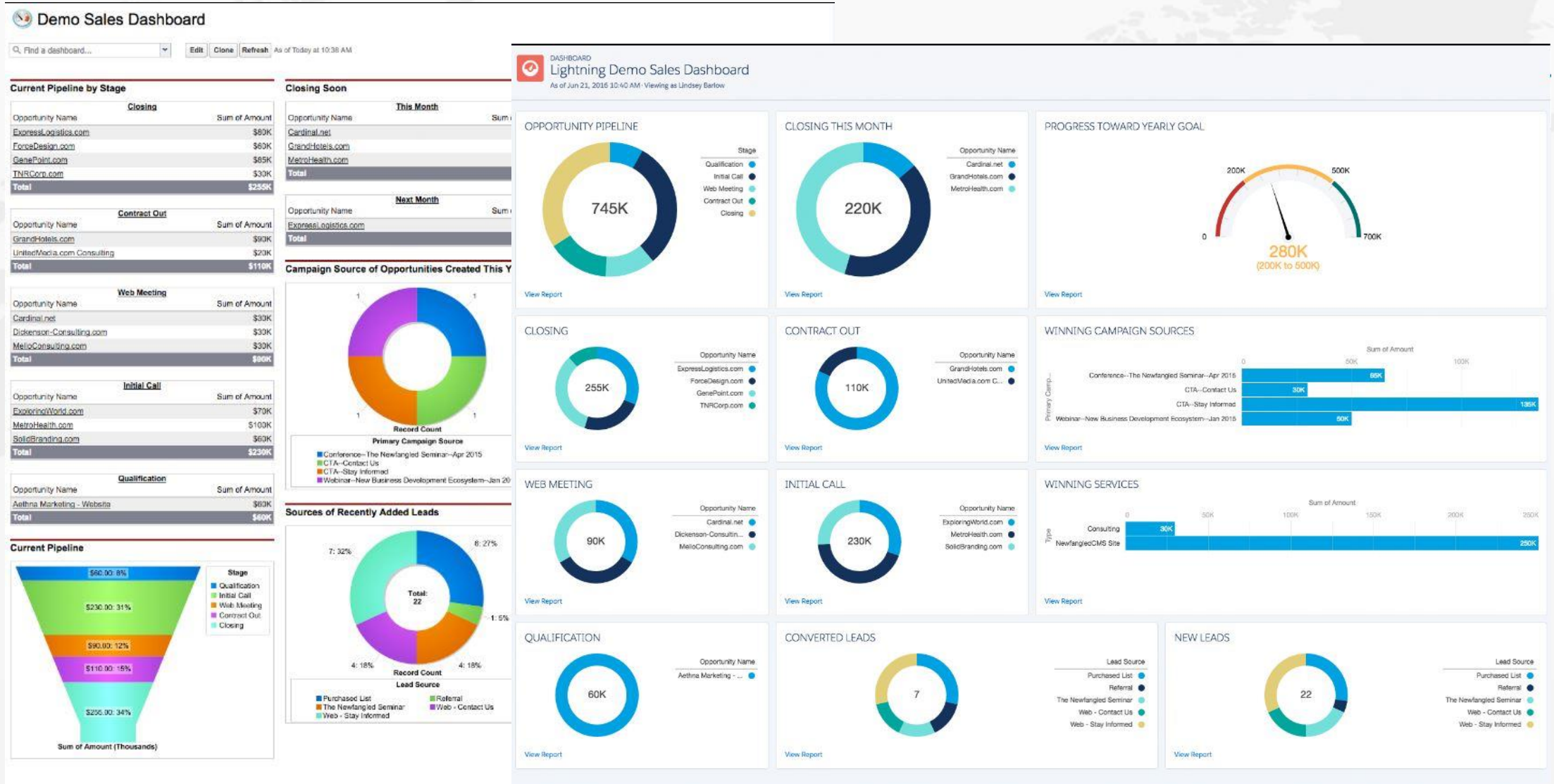
New Partners Help

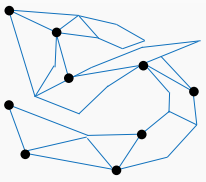
Amount	Probability (%)	Expected Revenue	Close Date	Last Modified
1,000.00	90%	\$72,000.00	7/1/2016	Lindsey Barlow 6/21/2016 7:50 AM
1,000.00	90%	\$72,000.00	10/2/2015	Lindsey Barlow 10/2/2015 12:47 PM
1,000.00	90%	\$72,000.00	5/14/2015	Lindsey Barlow 4/14/2015 11:27 AM
1,000.00	75%	\$60,000.00	5/14/2015	Lindsey Barlow 4/14/2015 11:26 AM

Chat




Reports and Dashboard





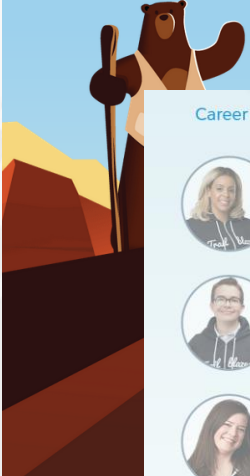
Learning Module - Trailhead





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Career Path > Business Analyst




SALESFORCE BUSINESS ANALYST


You thrive on data and providing key business insights based on analyzing multiple data sources. You take initiative to identify what the business should be tracking and evaluating. You are able to think through problems and make actionable recommendations.

Let Trailhead guide you

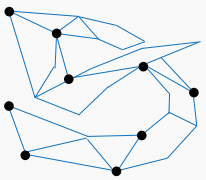
\$104,000 average salary (US data)	6,522 jobs last 12 months (US data)
24.2% annual growth rate (last 4 years)	23% % entry-level roles



Business Analyst



possibilities



Job Opportunity and Certification

- Administrator

- Administrator
- Advanced Administrator
- Platform App Builder
- CPQ Specialist

- Developer

- Platform Developer I
- Platform Developer II
- B2C Commerce Developer
- Platform App Builder

- Marketer

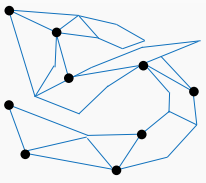
- Marketing Cloud Email Specialist
- Marketing Cloud Consultant
- Pardot Specialist
- Pardot Consultant

- Architect

- Technical Architect
- Application Architect
- System Architect

- Consultant

- Sales Cloud Consultant
- Marketing Cloud Consultant
- Service Cloud Consultant
- Community Cloud Consultant
- Nonprofit Cloud Consultant
- Pardot Consultant
- Field Service Lightning Consultant
- Einstein Analytics and Discovery Consultant



Q & A

