

CUSTOMER STORIES

SALESFORCE1 LABS



CUSTOMER STORIES HAVE COME OF AGE AS A BUSINESS TOOL

Thank you for installing the Salesforce1 Customer Stories App from the appexchange. Our goal with this application is to help you leverage customer stories, deal wins, project successes as a business tool within your organisation. These stories are valuable from a sales perspective to position with prospects but are also equally useful as

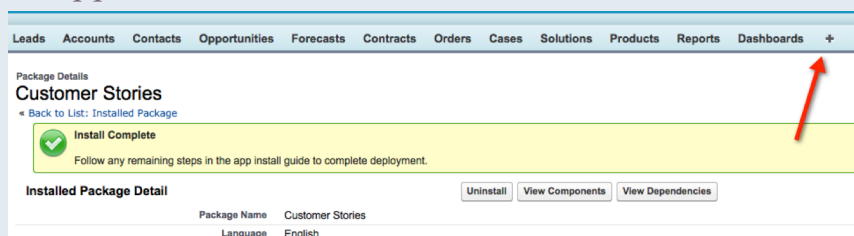
internal training and enablement tools for staff to understand common customer scenarios e.g. How did we select the right product for this customer? How did we arrive at the pricing? How did we overcome competitive challenges in this deal? Too often these nuggets of information are lost and forgotten.

1. Designed for Salesforce1
2. Automatically populates product and account information for easy search
3. Easy to include rich media like video and slides to bring the story to life.

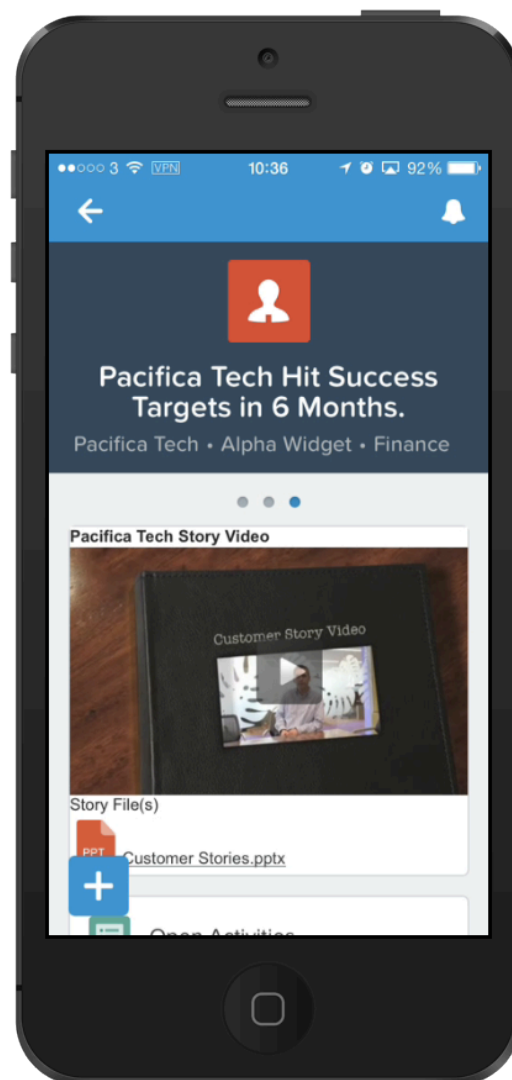


INSTALLATION GUIDE

1. After installation you will want to add the customer stories tab to your favourite Salesforce app(s). You can do this for all users from setup -> create apps and select the appropriate tabs or if you just want to add it to your version of the app use the + button in the menu bar.



2. You are now ready to start creating your customer stories. You can create stories from the related list on an account or directly from the customer stories tab.
3. Product information will automatically populated from assets associated with the account.



Customer Stories Edit New Customer Stories

Customer Stories Edit

Save Save & New Cancel

Story Information

Customer Story Name: My First Story

Keywords: Spotlight Story Customer Success

Products:

Description:

Rich Text

1. Use formatting
2. Images
3. Etc to deliver the story details

Video Host: YouTube

Video ID: tOwCK2fZgR8

Story Type: ---None---

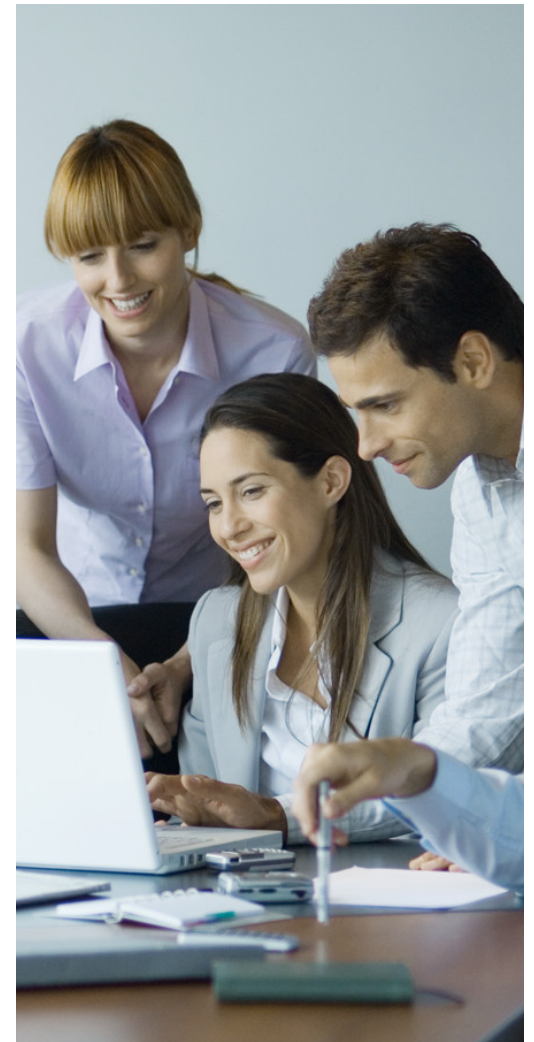
Region: ---None---

Account Information

Account:

Save Save & New Cancel

4. Only the video ID and the streaming service are needed for video content. Any files attached to the record in PowerPoint, PDF or image format will also get included in the Visualforce panel alongside the video. This makes the video and files very easy to access on Salesforce1 during the mobile experience.
5. The Account field is mandatory – each customer story must be associated with an account. Story Type and Region are recommended fields but you may want to edit the picklist values so that they are relevant for your organisation.
6. Data quality ratings and dashboards are driven by the completeness of the field information on the customer story page. Incomplete fields cause stories to have a lower score. Use the reports and dashboards to identify stories that need more refinement.



Now you are ready to inspire your employees, customers and prospects with your success stories. Remember to take advantage of video and images to tell your story. A great story has a persona, a problem, a helping hand (your product or service), a victory and permission to talk again (sequels!).