THE DEFINITIVE GUIDE
FOR ANYONE CONSIDERING SALESFORCE

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You've probably heard that Salesforce is a leading CRM — a tool meant to help employees track interactions with current and potential customers. And that's absolutely true. But the biggest misconception about Salesforce is that it's only a CRM.

In reality, Salesforce isn't just one thing. Rather, it's a suite of solutions designed to power your entire business, including — but not limited to — your marketing, sales and customer service teams.

With the right custom-built Salesforce setup, your company can become the kind of organization that drives efficiency and growth by bolstering customer relationships and leveraging valuable data. In other words, Salesforce can help you succeed by supercharging existing elements of your business. But to maximize that potential success, you need to know a thing or two about the Salesforce ecosystem — how the company's various products work, who they're meant for and common questions you might ask before an implementation. Don't worry, though. We're here to help.

If you're considering Salesforce, consider this a definitive, 3-step guide to learning everything you need to know.

STEP 1
UNDERSTAND WHAT SALESFORCE CAN DO

Three of Salesforce's most powerful products are aligned around the core elements of many businesses: Marketing, sales and customer service. To help you understand the functionality of these core platforms, let's start with a primer on how they work, both individually and together.

Marketing Cloud 101

For many businesses, the goal of marketing is to attract and convert leads. Stripped of its jargon, that means educating audiences about a particular product or service and identifying which individuals or groups are most likely to make a purchase. Those that seem ready to buy get passed to the sales team; those that don't need to be nurtured.

For marketers, there are a number of ways to reach these audiences: email, web content, social, mobile, advertising, events and more. Each of these channels presents a unique set of opportunities and challenges, of course, but the pros and cons get more complicated when layered on top of each other. How are you supposed to track and analyze so many multi-channel interactions?

Salesforce Marketing Cloud is a platform that makes all of that much easier.

salesforce marketing cloud

Take **campaigns**, for instance. Salesforce Campaigns allow marketers to create custom content, deliver it through multiple channels and track the results. Say you want to promote an upcoming webinar. You could set up an email campaign that directs a strategically chosen segment of your contact database to the registration page. At the same time, you might set up a social advertising campaign.

With Salesforce, anybody who signs up for the webinar will appear in the platform as a lead. With each lead, you'll be able to see their basic information and which campaign brought them to your registration page. Post-webinar, you'll be able to see who attended and who didn't. Perhaps most importantly, you'll be able to keep track of all future interactions with leads, no matter the communication channel.

The example above presents a relatively simple use case, but Marketing Cloud is capable of automating complex, 1:1 customer journeys. However you use Marketing Cloud, you're gathering valuable data. Which channels are most productive for your business? And which customer segments? As you continue to reach people in new ways, dashboards and reports will allow you to see exactly what's working and what isn't.

Sales Cloud 101

Once marketing has gathered and qualified a lead, it's sales' job to further vet it. Would this person be a good fit as a customer? Do they seem like they might be ready to buy? If the answer to either of these questions is no, sales could mark the lead as "not qualified."

salesforce sales cloud

If your sales team decides to pursue the lead further, however, then they might convert it into a **contact**. In this case, a contact is somebody who shows true potential as a customer, even if an actual sale seems a long way off (though it's worth noting that you can create contacts for anybody you want to track, including competitors, partners and even your own employees). When you convert a lead into a contact, Sales Cloud will also generate an **account**. An account simply represents the company where your contact works. Further into the sales process, you may acquire more contacts associated with that one account.

At the conversion stage, a salesperson also has the option to create an **opportunity**. An opportunity is neither a person nor a company, but the specific potential for a deal. Every business will need to define for themselves what constitutes an opportunity, but typical criteria include basic scope as well as revenue and timeline projections.

After a sale is won or lost, a salesperson can close the opportunity, and contacts and accounts will remain in the database.

Service Cloud 101

Closing a sale only marks the halfway point of the buying cycle. After that, it's time to provide great service. Thankfully, Service Cloud makes it easy by focusing on **cases.**

Any time a customer asks a question, offers feedback or reports an issue, this triggers a case tied to their contact information. However the customer chooses to connect — email, phone, web or social media — their case will be available to view by your entire team. Depending on what the customer needs, their case can be immediately triaged to the right person.

For inquiries that require multiple touch points over a span of time, this full-team visibility is essential. Customers don't want to explain their questions and problems again and again to new reps or via new channels, so all previous information needs to be stored in one easy-to-access place.

It's worth noting that the above represents a fraction of what Salesforce is capable of, but offers a good overview of how each platform can be used.

STEP 2

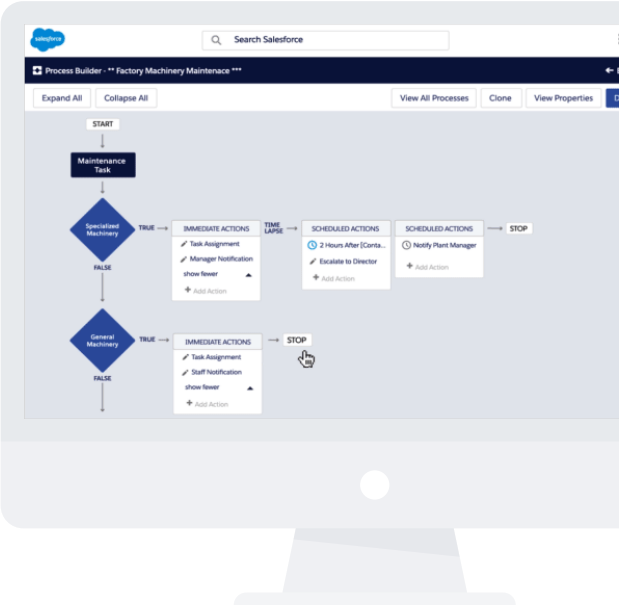
LEARN WHY SALESFORCE IS RIGHT FOR ANY SIZE BUSINESS

Working with so many different kinds of companies, we see on a daily basis why Salesforce works for businesses of every size. Here are three big reasons.

Scalability

Put simply, Salesforce designed its platforms with scalability in mind. Top to bottom.

Its standard functionality allows small businesses to start using the tool with little setup and training. On the other end of the spectrum, it can match the intricate and far-reaching needs of the world's biggest corporations. Salesforce offers unparalleled customizability, for example, so that it can handle the diverse challenges thrown at it. This trend holds true at a performance level as well — Salesforce's architecture is capable of accommodating millions of users. From application speed to data storage, you can feel confident that Salesforce will keep up with your users, no matter how many you have.

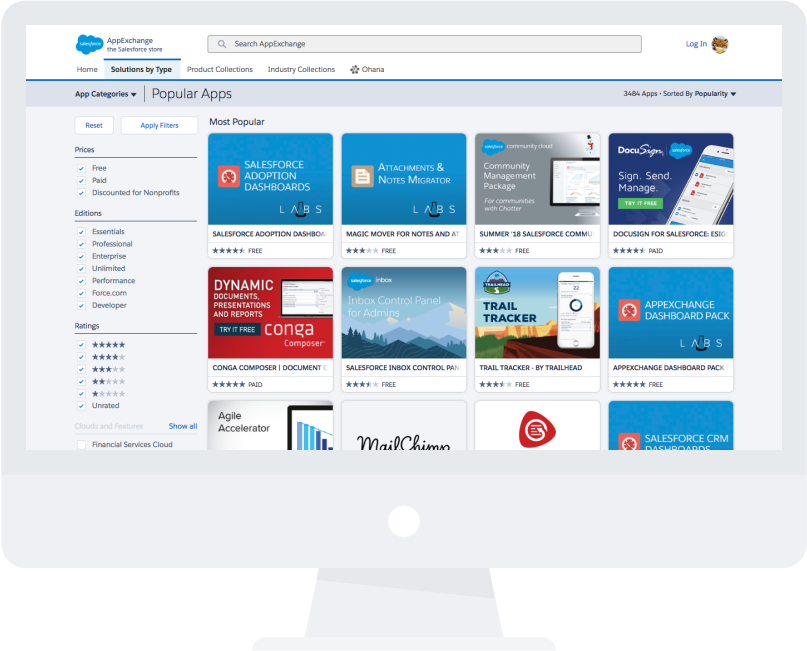


The platform's features offer your internal teams this same sort of scalability too. Features such as process automation, assignment rules, queues and account teams allow you to build processes that don't rely on any single person. No matter the size of your business, you can create the most efficient workflows possible on the Salesforce platform.

Diverse products

You don't have to worry that Salesforce won't fit your use case. Its portfolio of products includes both flexible industry staples like Sales Cloud, Service Cloud and Pardot, as well as industry-specific solutions such as Health Cloud and Financial Services Cloud.

The benefits of choosing the CRM market leader also include its expansive ecosystem of add-ons and pre-built integrations. The Salesforce AppExchange includes over 4,000 products, meaning that the vast majority of other tools your team uses probably connect to Salesforce. So whether you're a two-person sales team that only needs Gmail connected or a multinational corporation with a dozen other systems to integrate with Salesforce, the platform has you covered.



Flexible pricing

Pricing is the very reason some smaller businesses shy away from Salesforce, to be honest. For a long time, many competitors offered lower-cost alternatives. Salesforce recently changed that equation with the release of Salesforce Essentials. Now, small teams can purchase an easy-to-use platform at a much lower cost than Salesforce's other editions.

What this means is that Salesforce now offers a full scale of editions and pricing options that can meet any budget. Pair that with the scalability mentioned above, and you can be confident that Salesforce can work for your business at any stage of growth.

STEP 3
GET ANSWERS TO THE MOST COMMON QUESTIONS

As consultants, we get a lot of questions from people who are only just beginning to wrap their minds around what Salesforce can do. People who don't even know what they don't know yet. They're eager to learn, but the learning curve is steep. Below are answers to some of the things they wonder about the most.

Can Salesforce integrate with [insert application]?

Just as Salesforce products are designed to work well with each other, they're also built to pair with third-party applications, including ERP systems, accounting tools and pretty much anything else.

Keep this in mind, though: Integrations range from simple and out of the box to complicated and custom. Depending on what you're trying to do, you may need to bring in a skilled developer.

How much training would my team need to learn Salesforce?

Here the answer depends on the complexity of your implementation. For a simple boot-up project, an afternoon should be sufficient — just long enough to show your people how to click around, make a lead, convert a lead, etc.

For a larger or more complex implementation, however, you should plan on offering significantly more training. Different teams (sales, marketing, customer service) will need devoted sessions in

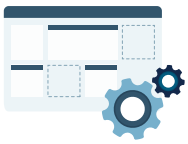
order to master the specific ways they'll be expected to use the new platform.

It's not uncommon for a company to skimp on training hours in order to save money, but in our experience, this isn't a great idea. The problems that arise from a poorly trained team are likely to cost you more in the long run.

How long will it take to get Salesforce up and running?

Again, this will depend on complexity. For us, a very simple build could take as little as two or three weeks. Transforming your entire business? That could take a year.

The average implementation, however — one with a reasonable number of customizations — is more likely to last a couple of months.



Where should I even start?

The best way to begin the implementation process is to assess the state of your core business processes, either internally or with the help of a consulting firm. Some good questions to ask include:

- How does your business run, and how will a CRM help it function more efficiently?
- What are your current pain points?
- Specifically, what do you hope to get out of Salesforce?

Answering questions like these will help you understand your best implementation options.

How do I get my team to actually use Salesforce?

Salesforce adoption is one of the biggest challenges our customers face, and it's an especially frustrating one. After putting so much time, money and energy into a Salesforce build, nobody wants to see their implementation fail due to a basic lack of use.

The most effective way to boost adoption starts at the top. Leaders need to explain why

Salesforce will be good for the company and how it will make the lives of its users easier. And they need to make it clear that not using Salesforce isn't an option.

If your team knows how strongly you believe in Salesforce, they'll be much less likely to keep hiding their data in spreadsheets.

Check out our on-demand webinar:

Can I use Salesforce on my smartphone?

You can! The Salesforce app allows you to do many of the same things as the web version. This is especially useful for salespeople on the road and service teams frequently out in the field.

How can Salesforce help me understand the health of my business?

A key goal of any successful Salesforce implementation is making sure your setup is built to measure the things that matter most. You want to gather data that's tied directly to your team's metrics and KPIs so you can track their successes.

By keeping all this data stored in one system, you'll be able to see a holistic picture of your business. Where is the company thriving, and where is it underperforming? Which teams are consistently reaching their goals? Custom dashboards make it easy to get answers.

So what comes next? Moving from knowledge to action. Meet with your team to start talking specifics about how Salesforce could help your business. After that, begin developing an implementation plan. Who will help you build out your Salesforce setup? And who will manage it once the implementation is complete? Do you already have an admin in mind? And what about training your users? Thinking through these questions now will help you down the line.

But don't worry if you're not sure of the answers. If you need more help, let us know.
We want to help you take the next step towards Salesforce.

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About the writers:

Some business leaders think that working with a Salesforce firm means consultants come in, grab your requirements, build out Salesforce, flip the switch, train the team and then leave. That's not the case with Torrent. We act as an external champion and CRM specialist that helps bring to life your unique business vision. Then we configure your Salesforce environment in a way that enables that vision and fits within the current processes of your team.

We're an accredited Salesforce partner, which means you get the benefit of an experienced team and access to best practices across every industry. We're passionate about Salesforce and work tirelessly to ensure buy-in and excitement from every member of your team. Salesforce ROI is our objective.

Let's continue the discussion