



Inbox Sidebar Comparison: Riva Insight and Salesforce Inbox

Read on if your organization is looking to reduce workflow friction for go-to-market teams as they strive to keep Salesforce up to date while working in their preferred system of action – Outlook. Salesforce Inbox surfaces basic CRM data into Outlook's email application. Riva Insight exceeds these capabilities by bringing CRM data in the context that matters to the end users, allowing for scalable, configurable access to customer data when and where it's needed. Read on—and learn where Inbox reaches its limits and Riva Insight soars.

Surfacing Salesforce Data in the System of Action

Riva Insight is built on the Riva Revenue Data Ops platform and benefits from its intelligent sync. Data gathered in Salesforce is automatically delivered to the Insight sidebar so end users can access current, comprehensive customer histories in the workflow of their system of action. Riva Insight offers advanced admin role-based customizations (including custom objects) so end users can see customer data in the context that matters to them. In contrast, Salesforce Inbox's UI is restricted by its limited configurability, absence of role-based customizations, and lack of support for custom objects and mapping.

Reduce Calendar Friction for Seamless Customer Interactions

A successful customer relationship is based on a pleasant, smooth and intelligent experience. As such, Riva Insight offers a range of enterprise-level calendar booking and meeting management capabilities to simplify the interactions go-to-market teams' have with customers. Users can leverage custom reusable availability links, implement meeting host delegation, and easily capture and share meeting notes with internal stakeholders with a click. On the other hand, Salesforce Inbox only offers basic calendar booking features with limited integrations.

Automation + Human Intelligence = Continuous Intelligence

Salesforce Inbox provides automation that best applies to simple, easily replicable sales processes where the goal is simply to get data into the CRM. But automation alone won't be able to handle intricate and complex sales journeys with high-end customers and the data they generate. By bringing automation and human intelligence together through features like data quality prompts on the Insight sidebar, Riva delivers on a higher goal – improving data trust throughout the organization.

Making Data Work for your Teams, Especially in Regulated Industries

Riva has honed its skills working with organizations in regulated industries for 12+ years to deliver solutions to meet complex, enterprise-level data security and compliance requirements. Riva Insight does its work connecting Outlook with Salesforce while following strict privacy and security policies and compliance regulations. On the other hand, Salesforce Inbox is a better fit for companies without industry regulations or specialized dataflow requirements.

Riva Insight: The Inbox Sidebar for Revenue Data Ops

If you are supporting a straightforward sales process and are simply looking to get Outlook data into Salesforce for storage, then Salesforce Inbox may be the solution for you. But, if your team uses Outlook as a system of action and you have more sophisticated requirements about your customer and deal data, Insight is probably the missing piece in your tech stack to align your platforms, people, and processes and deliver a better, consistent customer experience.

Comparing Capabilities

		 salesforce inbox
Support for Custom Dataflows	• Supports automated contact and lead creation directly from the email platform • Supports display and search capabilities for default and custom CRM objects • Supports custom field and object mapping	• New contacts or leads can only be created manually from the email platform • No support for automated sync of custom objects • No support for custom fields and object mapping
Role-based Sidebar	• Highly configurable for different levels of access	• Limited or no support for configurability per individual roles
Data Governance	• Focuses on implementing data governance principles throughout the organization • Leverages human intelligence with data quality indicators available for default and custom objects	• No focus on data governance and relying solely on data sync automation
Calendar Booking and Meeting Management	• Advanced calendar booking features, including meeting host delegation, custom reusable availability links, and more. • Advanced meeting management features, including capturing meeting notes, reminders to share notes, display of attendees' meeting responses, and more.	• Basic calendar booking features limited integrations, no meeting delegation, etc. • No meeting management features.