



## **A Review on Salesforce**

**Rohit Ukarande**

PG Student, Affiliated to Department of (MCA),  
P.E.S.'s Modern college of Engineering, Pune, India

**Yogeshchandra Puranik**

Assistant Professor, Affiliated to Department of  
(MCA), P.E.S.'s Modern college  
of Engineering, Pune, India

### **ABSTRACT**

Welcome to the Salesforce Customer Success Platform. We're the innovative company behind the world's #1 CRM platform that employees can access entirely over the Internet — there's no infrastructure to buy, set up, or manage — you just log in and get to work. And now our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.

Salesforce is a leading CRM (Customer Relationship Management) software which is served from cloud. It has more than 800 applications to support various features like generating new leads, acquiring new leads, increasing sales and closing the deals. It is designed to manage the organization's data focused on customer and sales details. It also offers features to customize its inbuilt data structures and GUI to suit the specific needs of a business. More recently, it has started offering the IOT (internet of things) connectivity to the CRM platform.

Salesforce started as a cloud based solution for CRM. CRM stands for Customer Relationship Management. It involves managing all aspects of relationship between an organization and its customers. For example, the contact details of the customer, the deals that are in progress or already completed, the support requests from a customer or a new lead from a new customer. Beyond the customer related information, it also involves storing and managing the details of the people and the concerned department from the seller organization that is managing the customer's account and needs. This makes it easy to manage and enhance

the relationship with the customer and hence better growth for the organization.

Following are the different features of the Salesforce platform –

#### **Contact Management**

To view customer contact details, activity history, customer communications, and internal account discussions, etc. In short, it manages all the data pertaining to the contact with a customer.

#### **Opportunity Management**

It provides the details of the stage a deal is in, the products involved in the deal, the quotation for the deal etc. In short it manages all the data that helps in identifying, progressing and closing a deal.

#### **Salesforce Engage**

This feature is focused on making personalized contact with a customer for various campaigns designed by the marketing team. It also provides real-time sales alerts based on the level of engagement with a customer.

#### **Sales Collaboration**

This feature helps in quickly finding experts who can help in closing a deal based on customer queries and feedback. In short, it helps in bringing in a collaborative effort to engage an entire team in the deal and make the deal happen.

## **Sales Performance Management**

It provides a metric-based goal setting, and also continuous feedback and rewards and recognition for the sales team. This helps in enhancing the performance of the sales team.

## **Lead Management**

This feature initiates and tracks the leads that are in progress. It also helps in continually optimizing campaigns across every channel.

## **Partner Management**

This feature helps in building a community with partners. It also helps in connecting directly with channel partners to share goals, objectives, and activities.

## **Salesforce Mobile App**

This is the mobile platform to carry out all the above activities on a mobile platform.

## **Workflow and Approvals**

It is a visual design to automate the business processes. The interface provides simple drag and drop options to make this design. It helps in creating a flexible approval process with deal discounts and expense management etc.

## **Email Integration**

Salesforce can integrate to an existing email platform. This helps in providing flexibility to the existing team with no additional learning curve.

## **Files Sync and Share**

This feature provides the sales team the power to easily share various files, discuss them and update them as needed. Also receive alerts when something in the file changes.

## **Reports and Dashboards**

Dashboards offer a real-time picture of the business at a glance. With this, anyone can create detailed reports which can be accessed from anywhere.

## **Sales Forecasting**

This feature helps in getting a real time view of the forecast of a sales team. It provides multi-currency

support and an in-line editing mode to manage the sales forecast well.

## **LITERATURE SURVEY**

Customer Relationship Management (CRM) has become one of the most dynamic technology topics of the millennium. According to Chen and Popovich (2003), CRM is not a concept that is really new but rather due to current development and advances in information and enterprise software technology, it has assumed practical importance. The root of CRM is relationship marketing, which has the objective of improving the long-term profitability of customers by moving away from product-centric marketing.

Bose (2002) noted that CRM was invented because the customers differ in their preferences and purchasing habits. If all customers were alike, there will be little need for CRM. As a result, understanding customer drivers and customer profitability, firms can better tailor their offerings to maximize the overall value of their customer portfolio (Chen and Popovich). The attention CRM is currently receiving across businesses is due to the fact that the marketing environment of today is highly saturated and more competitive (Chou et al, 2002). According to Greenberg (2004), CRM generally is an enterprise-focused endeavour encompassing all departments in a business. He further explains that, in addition to customer service, CRM would also include, manufacturing, product testing, assembling as well as purchasing, and billing, and human resource, marketing, sales and engineering. Chen and Popovich (2003) argued that CRM is a complicated application which mines customer data, which has been retrieved from all the touch points of the customer, which then creates and enable the organization to have complete view of the customers. The result is that firms are able to uncover and determine the right type of customers and predicting trend of their future purchases. CRM is also defined as an all-embracing approach that seamlessly integrates sales, customer service, marketing, field support and other functions that touch customers (Chou et al, 2002) . They further stated that CRM is a notion regarding how an organization can keep their most profitable customers and at the same time reduce cost, increase in values of interaction which then leads to high profits.

The modern customer relationship management concept was shaped and influenced by the theories of total quality management (Gambeson) and by new

technological paradigms (Zineldin, 2000). There is however, a perceived lack of clarity in the definition of customer relationship management, although all accepted definitions are sharing approximately the same basic concepts: customer relationships, customer management, marketing strategy, customer retention, personalization (Zineldin 2000).

However, while academics debate the subtitles of various definitions, the practitioners have developed a wealth of applicative papers analysing the concrete challenges and opportunities of implementing the systems (Bacuvier et al. 2001). CRM in some firms is considered as a technology solution, considering of individual databases and sales force automation tools and sales and marketing functions so as to improve targeting effort. Peppers and Rogers (1999) argued that other organizations view CRM as a tool, which has been particularly designed for one-to-one customer communications, which is the function of sales, call centres or the marketing departments. Accordingly Frow and Payne (2004) added that CRM stresses two-way communication from the customer to the supplier to build the customer over time. The two-way communication has been enhanced greatly by advances in technology particularly the Internet.

In term of information technology (IT), CRM means an enterprise –wide integration of technologies working together such as data warehouse, web site, and intranet/extranet, phone support system, accounting, sales, marketing and production. Kotler (2000) assured that CRM uses IT to gather data, which can then be used to develop information acquired to create a more personal interaction with the customer. In the long-term, it produces a method of continuous analysis and reinforcement in order to enhance customer’s lifetime value with firms.

Goldenberg (2000) believes that CRM is not merely technology applications for marketing, sales and services but rather when it is successfully implemented; it enables firms to have cross functional, customer-driven, technology-integrated business process management strategy that maximises relationships. Chin et al (2003) stated that that due to many technological solutions available for CRM automation, it is often misconstrued as a piece of technology. But they maintained that in recent times many companies have realized the strategic importance of CRM, and as a result, it is becoming a business value-effort rather than technology- centric effort.

Using information technology as an enabler, CRM strategy leverages key functional areas to maximize profitability of customer interactions (Chen and Popovich, 2003). It has been recognized that technological advancements and innovations , keen competitive marketing environment , coupled with the internet are main drivers of present and future customer profitability which makes it possible to appropriately and proportionately allocate firm’s resources to all functional areas that affect customer relationship ( Chou et al , 2003).

For customers, CRM offers customization, simplicity and convenience for completing transactions irrespective of the kind of channel of interaction used (Gulati and Garino, 2000). Many businesses today realize the importance of CRM and its potential to help them achieve and sustain a competitive edge (Peppard, 2000). This view was further boosted by Bose (2002) that as a result of changing nature of the global environment and competition, firms cannot compete favourably with minor advantages and tricks that can easily be copied by competing firms .The implementation of CRM is an enabled opportunity to rise above minor advantages with real focus on developing actual relationships with customers. Firms those are most successful at delivering what customers want are the more likely to be leaders of the future.

### **Operational, Collaborative and Analytical CRM:**

#### **Operational CRM:**

There are various ways through which a customer can approach the business. This interaction is direct with company and its employees. The junction where this interaction happens is called touch point. Usually transactions like sale, payment, information seeking, queries, suggestions, and complaints happen at these operational touch points. That is why it is also called front office CRM.

The customer can approach / be approached through the following ways:

- Face to face: Interacting while selling, serving customers by way of organizing events, promotions etc. P E R S O N A L I Z A T I O N Type of CRM mapped against degree of personalization Customer Interaction Management Responsive / Reactive Customer facing business process Interactive Customer Data analytics Proactive

- Database driven: In this interaction contacting customers is through Telephone/Email/Mail/Fax/Loyalty programs/Cards/ATMs/SMS.

- Mass Media: when the contact is through public broadcasting. The contact is public in nature and people at large are contacted. For example public advertising and public relations campaigns.



**Collaborative CRM:**

Jill Dyche defines Collaborative CRM as a specific functionality that enables a two way communication between a company and its customers through a variety of channels to facilitate and improve the quality of customer interaction. (Dyche 2002)

The essence of collaborative CRM is to manage partners of the firm. These could be channels, agents and other business stakeholders but not direct customers. The focus is on maintaining relations with partners to facilitate coordination in business.

**Analytical CRM:**

Also known as back office or strategic CRM. This type of CRM is characterized by presence of designations like business analysts. The objective of analytical CRM is to find out various taste, preferences, and activities of the customers so as to customize solutions for them. The basis of this data is captured customer interactions at various touch points. Extensive use of MIS and technology is done in Analytical CRM.

**Salesforce Workflow / Architecture and Application Description**

Salesforce delivers a highly customized experience to the customers, employees, and partners of an organization. Such a platform is used to customize standard functionality and create custom pages, components, apps, etc. Also it is done faster, mainly because of the superb architecture on which it is built. Below is a brief introduction to the Salesforce Architecture.

**Architecture Salesforce**

The architecture of Salesforce can be put into layers for better understanding. The purpose and function of each layer is described below –

**Trusted Multitenant Cloud**

Here multiple instances of one or multiple applications operate independently in a shared environment. The instances are referred as tenants and they logically separate from each other while physically remaining in the same hardware. It is called trusted because of both its robust nature and high security.

**Scalable Metadata Platform**

The metadata driven platform makes it easy for customization and scaling up as the amount of data or concurrent user instances increase.

**Enterprise Ecosystem**

The Enterprise Ecosystem of Sales is very large as a large number of partners contribute by creating and maintaining applications in this platform.

**CRM and Related Functionality**

Salesforce includes all aspects of CRM in its list of features and also extends it by providing features for creation of apps and integrating analytics, etc.

**APIs**

Salesforce provides powerful suite of APIs. This helps to develop and customize the Salesforce1 Mobile App.

**Software System Design**

Salesforce is a cloud based system it does not need any software installation on your part. All you have to do is sign up for a free trial and get started. The free trial account provides nearly all features which you

need to learn to understand the basics of Salesforce platform. Let us now discuss the steps to get started with the Salesforce environment.

Step 1 Go to the link Salesforce and click on free Trial. It takes you to a window where you have to fill in some details about you and sign up.

Step 2 - You will receive an activation mail for your account which also contains the details of your account and the duration of the trial period. Click on the link in the email to verify your email ID and activate the account.

Step 3 - Again visit the link Salesforce and click on login. Give the login credentials which you just created.

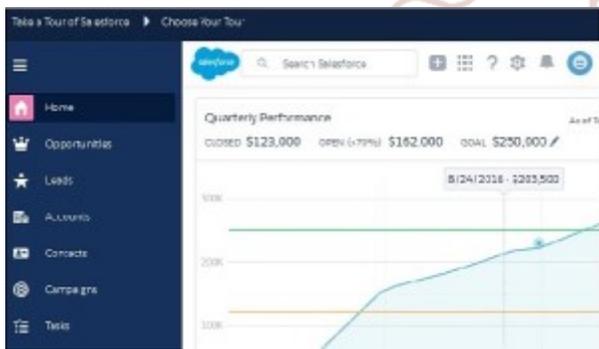


Fig3.2.1. directory Structure of Salesforce

## Salesforce Service & Application

### Salesforce - Sales Cloud

Sales Cloud part of the Salesforce.com platform which is focused on enhancing the effectiveness of the sales team of an organization and hence increases the amount of sales. It stands unique when compared to other sales methods as it provides both the account information of the customer as well as the information gathered from the social platforms about the product and customer. This helps in judging the potential of a sales lead and closing the sales faster.

Following are the Key business Goals achieved by using the Sales Cloud.

#### 1) Close more deals

The availability of all the account information as well as product information for customer's needs makes it easier to drive more number of leads to closure.

#### 2) Close deals faster

Mobile apps and visual design of the workflows for business process approvals makes it faster to close the deals.

#### 3) Get more deals

Continuous optimization of campaigns depending on the market response and closure interaction with channel partners gets more deals.

#### 4) Quicker decisions

The availability of reports and dashboards gives a very detailed picture of the business scenario and also increases accuracy of sales forecasting. So the business decisions are taken quickly.

### Key Features of Sales Cloud

In this section, we will discuss the key features of Sales Cloud. The features are described below –

**Contact Management** - Gives complete information on customers including previous communications, discussions, key contact numbers and emails.

**Opportunity Management** - It helps create and change quotes in response to sales interaction and deal scenario.

**Salesforce Engage** - Gives alerts on active leads and create personalized campaigns.

**Lead Management** - Helps assign leads to right people and track the campaigns.

**Reports and Dashboards** - Helps create dashboards which can be drilled down for further information. This leads to faster decisions.

**Sales Forecasting** - Gives accurate view of sales forecasting which can be adjusted based on real-time data.

**Workflow and Approvals** - Helps simplify the approval process and automate any business process using visual drag and drop interface.

**Territory Management** - Helps create different territory models and apply rules to them.

**Files Sync and Share** - Search, share and find files faster. This leads to a greater collaboration.

Sales Performance Management - Helps create a link between sales data and sales goals. It also helps in creating performance summaries.

Partner Management - Easily connect with partners and give them a view of sales performance. It also helps in easy on boarding, training and supporting sales partners.

### Advantages of Salesforce

Salesforce is by far the largest and most widely-known CRM. This impressive level of success is well-deserved due to the many incredible advantages and extensive resources that Salesforce provides for its users. There are a great many advantages to using this CRM, and different companies may find some more useful and important than others. However, this article will briefly look at the top 5 advantages that have the widest range of applicability and effectiveness for the largest number of users.

#### 1) Ease of Use –

It stands to reason that one of the single most important elements of any service is its ease of use, this is particularly true considering that Salesforce CRM is targeted to a broad range of companies and business, many of whom may not have a background in tech and software. For the CRM to reach its full potential it must be easy for even novice users to work with.

#### 2) Excellent Functionality

Salesforce has broad applicability for a wide range of different companies and businesses. The key to this successful approach is in its flexibility and customization potential. Salesforce integrates well with a host of different business models because it is able to provide report and analytics that are tailored to the specific needs of its users.

#### 3) Flexibility and Customization

Salesforce has broad applicability for a wide range of different companies and businesses. The key to this successful approach is in its flexibility and customization potential. Salesforce integrates well with a host of different business models because it is able to provide report and analytics that are tailored to the specific needs of its users

#### 4) Outstanding User Resources

In order to provide its hallmark ease of use, as well as to educate its customers on the excellent functionality, flexibility, and customization options that it offers, Salesforce has invested an incredible amount of time, money, and innovation in providing users with an outstanding array of resources. Salesforce offers educational and informative blogs and article posts, it routinely does educational webinars, hosts its own YouTube channel complete with videos covering a full spectrum of topics, and it also publishes a thoroughly comprehensive web-accessible user guide.

#### 5) The AppExchange

It is fair to say that apps have exploded in a big way all over the public consciousness in recent years. Nowadays many times the first thing that people do when they want to accomplish something digitally is to check and see if “there is an app for that.” The answer is that with Salesforce’s AppExchange there probably is. This marketplace of easy to access, download, and install apps provides users with even more resources, options, and expanded functionality.

#### Salesforce.com Key disadvantages

- At times, there can be too much customization and the interface can be filled with cumbersome and tedious tools which can be seen as repetitive or distracting.
- Some users face difficulties in the transition between transactions. Some have to go through multiple screens to process transactions.
- Salesforce has its own maintenance schedule since runs on its own cloud server. As a result, there are times that the application will not be accessible.
- Users can also lose a personal touch as in the process of automation
- Salesforce contains barriers to adoption. This means that even though Salesforce is cheap, the cost to integrate the application and redesigning their IT to incorporate it into a company is not the same as the cost of acquiring Salesforce. It is possible that the cost of integrating it can exceed the costs of the software itself.
- Customization toolkits can be cumbersome to use, even to many seasoned administrators
- Dashboards may not reflect the application security for specific users without significant administration effort.
- No Service Level Agreement provided in standard contract.

- Data centre reliability has been questioned and several major interruptions in service have been widely publicized

Compared to Microsoft Dynamics it is

- More expensive
- Not as highly configurable
- Only available in SaaS deployment

## CONCLUSION

The main purpose of this review paper is to establish the basic concepts of SALESFORCE.

Salesforce is easy to learn and growing technology in the marketing and every data is stored into the cloud. So you can access anywhere and any device. Also for learning this technology you don't need to have the coding knowledge.

Every learning material is available into the internet and Salesforce.com also free demo is available.

## REFERENCES

### Research Paper:

1. Salesforce Tool for CRM : A Comparative Study Seeza Franklin<sup>1</sup>, Prajakta Pravin More - International Journal of Current Trends in Engineering & Research (IJCTER)
2. Salesforce Design with experience – based learning -IIE Transactions (2004)36, 941-952

### Links:

1. <https://www.google.co.in>
2. <https://www.salesforce.com/in/>
3. [http://shodh.inflibnet.ac.in:8080/jspui/bitstream/123456789/52/4/04\\_chapter%202.pdf](http://shodh.inflibnet.ac.in:8080/jspui/bitstream/123456789/52/4/04_chapter%202.pdf)

