

LEARNING MADE EASY



7th Edition

Salesforce®

for
dummies®
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Manage sales, marketing,
and customer service

Use pipeline tools to predict
sales performance and more

Organize leads and contacts to
track relevant interactions

Liz Kao

Jon Paz

Salesforce Consultants

Salesforce®

for
dummies®
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Salesforce[®]

7th Edition

by Liz Kao and Jon Paz

for
dummies[®]
A Wiley Brand

Salesforce® For Dummies®, 7th Edition

Published by: **John Wiley & Sons, Inc.**, 111 River Street, Hoboken, NJ 07030-5774, www.wiley.com

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Published simultaneously in Canada

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Library of Congress Control Number: 2019953291

ISBN 978-1-119-57632-7 (pbk); ISBN 978-1-119-57633-4 (ebk); ISBN 978-1-119-57631-0 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

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Introduction

Salesforce.com *For Dummies*, 7th Edition, is for users of Salesforce, including those users who have the Unlimited, Enterprise, or Professional Edition. It's for Salesforce users who want to quickly know how to use this web-based application in its new user interface, the Lightning Experience. As a web-based application, Salesforce runs "in the cloud" — also known as software-as-a-service (SaaS) — for sales, marketing, and customer service.

About This Book

Don't use this book to find out how Salesforce works. Use this book to find out how you can manage your customers and your teams and close more business transactions by using Salesforce:

- » **If you're a sales rep**, this book shows you how to navigate Salesforce to manage your leads, accounts, contacts, and opportunities. Spend less time doing administrative work and more time focused on making money.
- » **If you're a sales manager**, this book shows you how to use Salesforce to track team activities and pipeline, shorten the ramp-up time on new hires, and pinpoint key deals that require your involvement.
- » **If you're in marketing**, this book shows you how to use Salesforce to make an immediate and measurable impact on your sales organization. We cover how to manage campaigns and track leads to fill your funnel.
- » **If you're in customer service**, this book shows you how to manage customer issues, from creation to resolution. Support managers will see how to improve agent productivity and customer self-sufficiency.
- » **If you sit on the executive team**, this book shows you how to use Salesforce for internal collaboration and to measure your overall business with reports and dashboards.
- » **If you're an administrator or involved in your company's customer relationship management (CRM) initiative**, this book gives you practical knowledge for customizing, configuring, maintaining, and successfully implementing your solution.

We show you everything you need to know to manage the life cycle of your customer relationships in Salesforce, from qualifying leads to closing opportunities to handling service agent inquiries. Along the way, we share a laugh or two. And this book can expose you to useful features and functionality that you might not have even known existed!

Note: Not all portions of this book necessarily apply to your edition of Salesforce. Different editions have varying degrees of features and functionality. We make sure to point out the differences where relevant.

This book has been revised to reflect the latest Salesforce.com product and feature offerings as of the Summer 2019 release. Also, as of this edition, we provide configuration guidance for the Lightning Experience UI, which applies to new customers and is the eventual direction for customers who are still using the Classic UI. Salesforce is an Internet-based service where new releases occur simultaneously for all customers, about three times a year, without your having to lift a finger (okay, except to just log in). Because of this model, Salesforce.com can release new versions of its product faster than many traditional software vendors — and faster than we can write! We did our best to update this book to the current version of the product, but please bear in mind that new versions of Salesforce are always in the works.

Keep in mind that references to the product and company use the word *Salesforce*. That's a tiny detail, but we didn't want you to think our eagle eyes had glossed over it!

Finally, within this book, you may note that some web addresses break across two lines of text. If you're reading this book in print and want to visit one of these web pages, simply key in the web address exactly as it's noted in the text, pretending as though the line break doesn't exist. If you're reading this as an e-book, you've got it easy — just click the web address to be taken directly to the web page.

Foolish Assumptions

Please forgive us, but we make one or two foolish assumptions about you, the reader. We assume the following:

- » You have a Salesforce account and some interest in knowing how to use it, beyond the mere curiosity of reading our riveting prose.
- » Your company's Salesforce instance is using or transitioning to the Lightning Experience UI.

- » You have some business experience — at least enough to understand that winning deals is good, and losing deals is bad.
- » You have at least a vague idea of what a database is, including basic concepts such as fields, records, files, and folders. (Imagine an organized filing cabinet and all its contents.)

Icons Used in This Book

To help you get the most out of this book, we place icons here and there that highlight important points. Here's what the icons mean:



TIP

Next to the Tip icon, you can find shortcuts, tricks, and best practices to use Salesforce more effectively or productively.



WARNING

Pay extra attention when you see a Warning icon. It means that you might be about to do something that you'll regret later.



REMEMBER

When we explain a juicy little fact that bears remembering, we mark it with a Remember icon. When you see this icon, prick up your ears. You can pick up something that could be of wide or frequent use as you work with Salesforce.



TECHNICAL
STUFF

When we're forced to describe something geeky, a Technical Stuff icon appears in the margin. You don't have to read what's beside this icon if you don't want to, although some readers might find the technical detail helpful.

Beyond the Book

In addition to what you're reading right now, this product also comes with a free access-anywhere Cheat Sheet that tells you how to perform your day-to-day functions in Salesforce. To get this Cheat Sheet, simply go to www.dummies.com and type **Salesforce.com For Dummies Cheat Sheet** in the Search box.

Where to Go from Here

If you're just getting started with Salesforce, you may want to turn the page and start reading. If you're an administrator and have a deadline, you may want to jump to Part 6. If you're a manager, try reading about reports and dashboards in Part 7. Sales reps and service reps should start in on Parts 8 and 4, respectively. Regardless of what you choose, we're sure that you'll find what you're looking for!

1

Introducing Salesforce

IN THIS PART . . .

Understand more about customer relationship management and the life cycle of a customer.

See how Salesforce can improve various parts of your sales process.

Get the highlights of Salesforce's primary product lines.

- » Looking at the fundamentals of customer relationship management
- » Understanding how customer relationship management helps you manage your business

Chapter **1**

Customer Relationship Management at a Glance

You may not realize it yet, but every time you log in to Salesforce, you're accessing an extremely powerful lever of change for you, your group, and your company.

Sounds like a tall order, but consider this: What value do you put on your customer relationships? Your partner relationships? If you're a sales rep, it's your livelihood. And if you're in management, you have fewer assets more valuable than your existing partner and customer base. What if you had a tool that could truly help you manage your partners and customers?

That's where customer relationship management software comes in. *Customer relationship management* (CRM) is an umbrella term for the parts of your business that are "front office," also known as those that have direct interactions with your customers and prospective customers. The CRM life cycle encompasses business processes and associated applications that help businesses better track their leads, manage customers, track opportunities, resolve cases, and more.

The more you and your team adopt a CRM system into your work, and you determine how you want your business process to be reflected within the technology, the more information you'll have at your fingertips to deepen customer relationships and improve your overall business.

In this chapter, we establish a common understanding of the CRM life cycle. Then we describe areas where a CRM can improve your business.

Introducing the Customer Relationship Management life cycle

Under the umbrella of CRM additional processes exist that focus on specific areas of the customer life cycle. For example, you might hear the phrases *marketing automation*, *sales force automation*, and *service and support*. These are front-office areas of your business that vendors (like Salesforce.com!) work on to make your front-office teams more efficient and productive.

Understanding your customer's customer

How can you sell to and retain customers if you don't understand their needs, key contacts, and what account activities and transactions have taken place? A CRM system allows you to track all your important customer interactions and data so that you can develop solutions that deliver real value to your customers, which in turn should mean higher customer satisfaction with *their* customers. Whether people are in marketing, sales, or customer support, they should all have the ability to access the same source of truth about your customer. After all, how can your company serve its customers well if you're not familiar with how your products and services help improve your customers' customers' (no, that's not a typo) experience?

Centralizing customer information under one roof

How much time have you wasted tracking down a customer contact or an address that you know exists within the walls of your company? What about trying to find out which sales rep owns the relationship with a subsidiary of a global customer? A good CRM system lets you quickly centralize and organize your accounts and contacts so that you can capitalize on that information when you need to.

Looking to Customer Relationship Management to Solve Critical Business Challenges

We could write another book telling you all the great things you can do with Salesforce, but you can get the big picture about CRM systems' benefits from this chapter. We focus here on the most common business challenges that we hear from sales, marketing, and support executives — and how a CRM system can overcome them.

Expanding the funnel

Inputs and outputs, right? The more leads you generate and pursue, the greater the chance that your revenue will grow. So, the big question is, “How do I make the machine work?” A CRM application helps you plan, manage, measure, and improve lead generation, qualification, and conversion. You can see how much business you or your team generates, the sources of that business, and who in your team is making it happen.

Consolidating your pipeline

Pipeline reports give companies insight into future sales, yet we've worked with companies in which generating the weekly pipeline could take more than a day of cat herding and guesswork. Reps waste time updating spreadsheets. Managers waste time chasing reps and scrubbing data. Bosses waste time tearing their hair out because the information is old by the time they get it. The prevalence of cloud computing makes this traditional method of siloed data collection obsolete (or pretty darn inefficient). A good CRM system helps you shorten or eliminate all that pulling and pasting of data across multiple sources. As long as reps use the system to manage all their opportunities in one place, managers can generate updated pipeline reports with the click of a button.

Collaborating effectively with your colleagues

Remember when you were the new person at the company, and you had to find the veteran who knew everything in order to get more info on a particular customer, process, or product? Even at smaller companies, it takes time to discover who holds that extra bit of historical knowledge that could help you close that

important deal or resolve a support issue. Other times, you may be so busy that you're out of the loop on certain key company updates, even when departments try to keep you informed. What if you could harness the insights from others within the company, yet not be overwhelmed by information overload? A CRM system should provide a means for employee communication that decreases email, and increases internal awareness on the business issues that matter the most to you, so you're always up to date and never caught unawares.

Working as a team

How many times have you thought that your own co-workers got in the way of selling? Oftentimes, the challenge isn't the people, or even the technology, but standardizing processes and clarifying roles and responsibilities. A CRM system will let you define teams and processes for sales, marketing, and customer service so that the left hand knows what the right hand is doing. It should also be flexible enough to change all those team members the next time a reorg happens. Although a CRM system doesn't solve corporate alignment issues, the tool should drive and manage better team collaboration.

Extending your sales force with partners

In many industries, selling directly is a thing of the past. To gain leverage and cover more territory, many companies work through partners. CRM systems should let your channel team track and associate partners' deals and get better insight about who their top partners are. Partners now can strengthen their relationships with their vendors by collaborating more easily on joint sales and marketing efforts.

Beating the competition

How much money have you lost to competitors? How many times did you lose a deal only to discover, after the fact, that it went to your archenemy? If you know who you're up against, you can probably better position yourself to win the opportunity. CRM systems let you and your teams track competition on deals, collect competitive intelligence, and develop action plans to wear down your foes.

Improving the customer experience

As a salesperson, have you ever walked into a customer's office expecting a bed of roses only to be hit with a landmine because of an unresolved customer issue? And if you work in customer support, how much time do you waste on trying to

identify the customers and reviewing the context of previous support interactions? A CRM system should let you efficiently capture, manage, and resolve a high volume of customer issues that come in from a variety of communication channels. The customer relationship doesn't end once they've bought your product — that's just the beginning. A CRM system should allow sales reps to have visibility into the health of their accounts, and service can stay well informed of sales and account activity.

Measuring the business

How can you improve what you can't measure? Simple, huh? If you use your CRM system correctly and regularly to manage customers, you have data to make informed decisions. That benefits everyone. If you're a rep, you know what you need to do to get the rewards you want. If you're a manager, you can pinpoint where to get involved to drive your numbers. A CRM system's reporting and dashboards should provide easy-to-use tools to measure and analyze your business.

Selecting Salesforce as Your Customer Relationship Management System

Salesforce wasn't the first CRM system to hit the market, but it's dramatically different from the other CRM systems you may have used (spreadsheets and sticky notes count as a system, too!). Unlike traditional CRM software, Salesforce is the first successful business application offered as an Internet service. You sign up and log in through a browser, and it's immediately available. We currently call this *cloud computing*, where the customers access “the cloud” (that is, the Internet) for their business needs, and are not required to install any traditional software on, presumably, Earth. As long as you have an Internet connection, you can be anywhere in the world and have access to the clouds.

You may already be at a company that uses cloud-based applications, as Salesforce.com's success has spawned a whole new marketplace full of business applications done “in the cloud.” Or you may just be entering the workforce, but you're very familiar with the use of Internet-applications in your personal life (think Twitter, Instagram, or Facebook). If this is your first foray into cloud computing, you may be taking a first step by yourself or with the rest of your company. Don't worry — your company made the right choice by picking Salesforce.

Salesforce customers typically say that it's unique for three major reasons:

- » **It's fast.** When you sign on the dotted line, you want your CRM system up and running yesterday. Traditional CRM software can take more than a year to deploy; compare that to months or even weeks with Salesforce.
- » **It's easy.** End user adoption is critical to any application, and Salesforce wins the ease-of-use category hands down. You can spend more time putting it to use and less time figuring it out.
- » **It's effective.** Because it's easy to use and can be customized quickly to meet business needs, customers have proven that it has improved their bottom lines.

Salesforce's success has empowered a whole new generation of managers and administrators to become business operations gurus. Cloud computing's generally lower licensing costs, its ability to allow system configuration to happen with no prior programming experience, and its ability to make modifications quickly to the system mean that newer businesses can compete with slower, older, bigger competitors, but at a fraction of the cost.

In the next chapter, we cover more specifics about Salesforce.com's products.