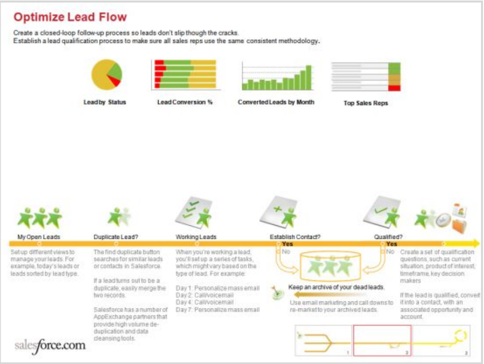
Salesforce.com CRM Process Maps

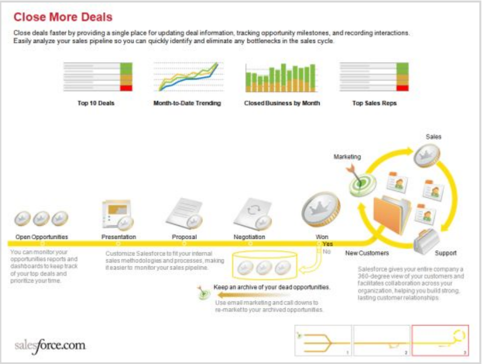
Описание основных процессов

- Продажи и маркетинг
- Сервисное обслуживание
- Управление активностью
- Управление отношениями с партнерами

Sales and Marketing

Process Map





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Generate More Leads

Plan and execute marketing campaigns that generate demand for your product or service.
Capture those leads through a variety of channels including your Web site.

Campaign ROI | Top Search Terms | Leads by Source | Lead Quality

Plan and Execute Marketing Campaign

- Google AdWords
- Email Marketing
- Direct Mail
- Cold Calls
- Partners
- TV
- Radio
- Events
- Trade Shows
- PR

Web Site Visitors

- Organic Web traffic
- AdWords referrals
- Email responses

Web Form

- "Contact me" request
- Free trial
- Event registration

Inbound Calls

- Yellow pages
- Google Maps
- Word-of-mouth referrals

Create New Leads

- Search for the customer in Salesforce
- If one doesn't exist, create a new lead

Lists

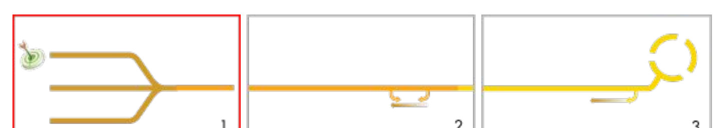
- Purchased list
- Trade show
- Legacy data

Import Data

- Use the import wizard or Excel connector

Lead Capture

- Set up auto-response emails
  - -"Thank you for your interest"
  - -Your trial information
  - -Event details
- Set up lead assignment rules
  - -Geography
  - -Company size
  - -Product of interest



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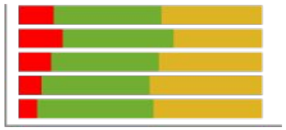
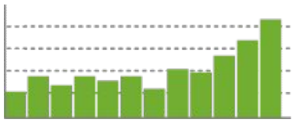
Optimize Lead Flow

Create a closed-loop follow-up process so leads don't slip though the cracks.
Establish a lead qualification process to make sure all sales reps use the same consistent methodology.

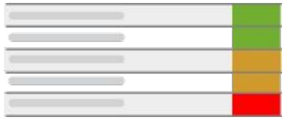
Lead by Status



Lead Conversion %



Converted Leads by Month



Top Sales Reps

Set up different views to manage your leads. For example, today's leads or leads sorted by lead type.

The find duplicate button searches for similar leads or contacts in Salesforce.

If a lead turns out to be a duplicate, easily merge the two records.

Salesforce has a number of AppExchange partners that provide high volume de-duplication and data cleansing tools.

When you're working a lead, you'll set up a series of tasks, which might vary based on the type of lead. For example:

Day 1: Personalize mass email
Day 2: Call/voicemail
Day 4: Call/voicemail
Day 7: Personalize mass email

Keep an archive of your dead leads.

Use email marketing and call downs to re-market to your archived leads.

Create a set of qualification questions, such as current situation, product of interest, timeframe, key decision makers

If the lead is qualified, convert it into a contact, with an associated opportunity and account.

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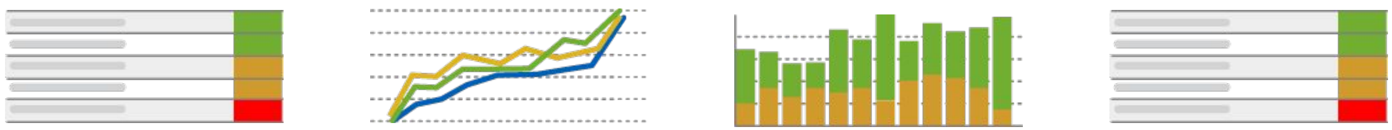
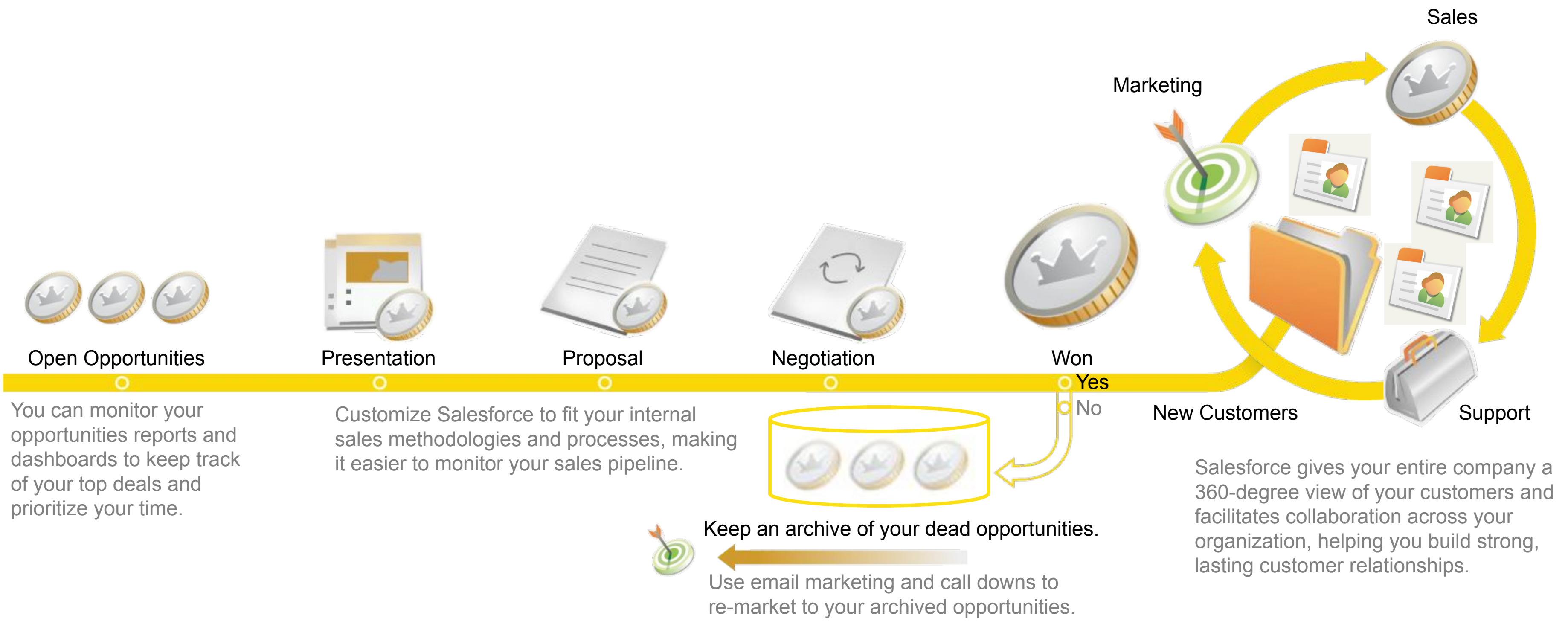
Close More Deals

Close deals faster by providing a single place for updating deal information, tracking opportunity milestones, and recording interactions. Easily analyze your sales pipeline so you can quickly identify and eliminate any bottlenecks in the sales cycle.





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Sales and Marketing: Tools and Terminology

Below you'll find the tools and terminology used in the application and online training. For more information visit Successforce.com, the Salesforce.com Online User Community. You can search the site, browse around, and see what the community is interested in.

Campaigns

A campaign is an outbound marketing project that you want to plan, manage, and track within Salesforce. It can be a direct mail program, seminar, print advertisement, email, or other type of marketing initiative.

Accounts

Accounts are your organization's customers, competitors, and partners. Each account stores information such as name, address, and phone numbers. For each account, you can store related information such as opportunities, activities, cases, partners, contracts, and notes.

Google AdWords

Google AdWords™ is an online advertising service used to create advertisements that display on major search engines, including Google. Many Salesforce customers advertise online with Google AdWords as a mechanism to generate leads.

Contacts

Contacts are all of the individuals associated with your business accounts that you need to track in Salesforce. You can store various information for a contact, such as phone numbers, addresses, titles, and roles in a deal.

Web-to-Lead Form

With Web-to-Lead, you can gather information from your company's website and automatically generate leads. Web-to-Lead form can be used for contact me requests, registration pages, or campaign landing pages.

Opportunities

Opportunities are the sales and pending deals that you want to track. By adding opportunities, you are also building your "pipeline," which will contribute to your forecast. You can also link opportunities to campaigns to help measure the ROI of your marketing programs.

Leads

A lead is a prospect or potential opportunity - a person you met at a conference who expressed interest, or someone who filled out a form on your company's website.

Products

Products are the individual items that you sell on your opportunities. You can create a product and associate it with a price in a price book. Each product can exist in many different price books with many different prices. A product that is listed in a price book with an associated price is called a price book entry.

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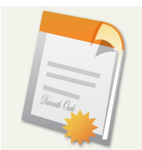
Forecasts

A forecast is your best estimate of how much revenue you can generate in a quarter. This amount is divided between Commit Amount - the amount you can confidently close - and Best Case Amount - the total amount of revenue you might possibly generate. A manager's forecast should include the amount of revenue the entire team can generate together.



Contracts

A contract is a written agreement between two or more parties. Many companies use contracts to define the terms for doing business with other companies. Track the contract through your organization's approval process and use workflow alerts to notify yourself when to initiate contract renewals.

Documents

A document library is a place to store files without attaching them to accounts, contacts, opportunities, or other records. Each document in the document library resides in a folder. The folder's attributes determine the accessibility of the folder and the documents within it.

Calendar Events

Group calendaring will helps you better collaborate as a team, and arrange meetings with prospects and customers.

Task

Tasks are to-do items that need to be followed up on. They can be associated with accounts, contacts, leads, or other custom objects. You can follow up on the task yourself, or assign it to another user.

Activities

Maintain a historical record of all activities related to an account, contact, or opportunity. Your activity history includes emails, call notes, and calendar events, so everyone is on the same page.

Reports

Reports are lists, summaries, and analyses of your data, which you can display or print. To help you monitor your organization, Salesforce offers a wide range of standard reports, accessible in the Reports tab. You can also create new custom reports to access exactly the information you need. You can subtotal and limit your data to help you analyze trends and get a concise picture of what is happening in your organization.

Dashboards

Dashboards give you a real-time snapshot of corporate metrics and key performance indicators. A dashboard is a group of different charts (or components) that graphically display your custom report data. You can select up to 20 different custom reports to display data graphically as charts in each dashboard.

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Search

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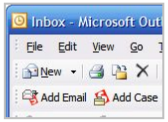

Connect Outlook

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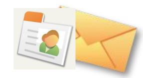
Web-to-Lead Form

You can set up a Web-to-Lead form to capture contact me requests from your company's website. With a lead de-dupe solution you can automatically route those requests to the person who owns the account.

CTI Integration

With computer-telephony integration (CTI) capabilities, you can directly integrate your telephone network into Salesforce and access it entirely through the familiar, browser-based Salesforce interface. With the combined power of CTI and the new Salesforce Console, salesforce.com delivers unlimited productivity to your call centers.



Email Templates

With Salesforce you can create email templates for common emails such as web-to-lead responses, sales prospecting, announcements, and internal workflow. You can even personalize parts of the email with information from the contact or account record.

Mass Email

Plan and execute email campaigns targeted at prospects and customers. Enterprise Edition customers can send 500 emails per mass mailing, while Unlimited Edition customers can send 1,000 emails per mass mailing. Salesforce can also integrate with third-party marketing solutions and offers out-of-the-box integration with several top email marketing vendors.

Email Tracking

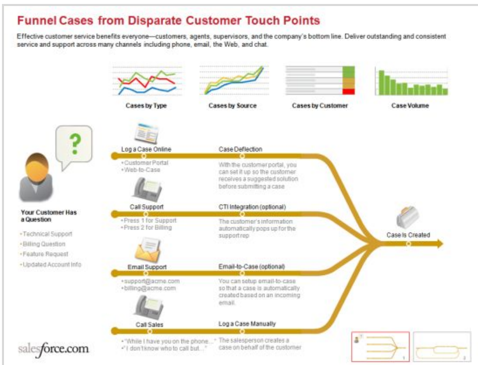
Evaluate the success of email campaigns with integrated response tracking and easy monitoring of key campaign metrics, such as whether recipients open the messages, when they open them, and more.

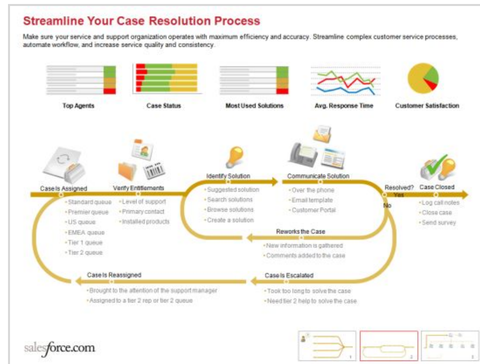
Import Wizard

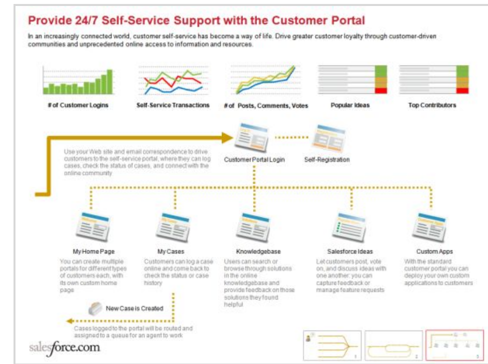
The ability to easily import data into Salesforce is one of the application's key benefits. Import excel worksheets or CSV (comma separated value) files. Map the information to leads, contacts, accounts, solutions, and custom objects. Search Import Tools on Successforce.com for more information.

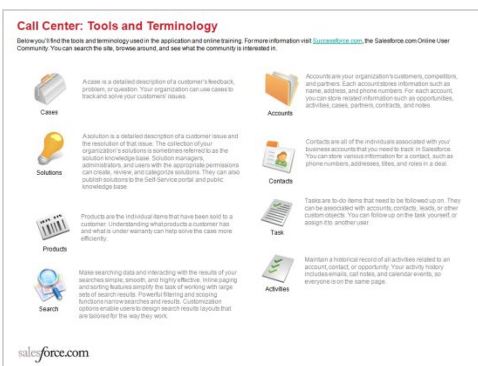
Service and Support

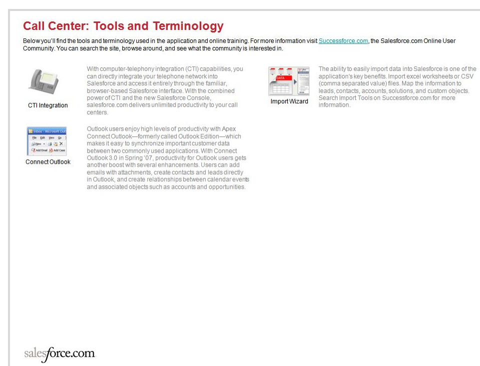
Process Map

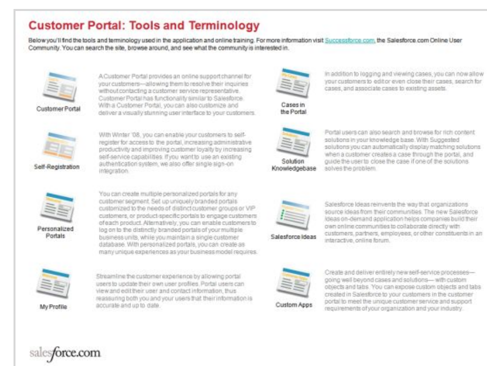












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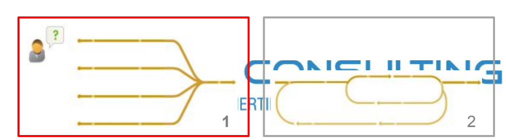
Funnel Cases from Disparate Customer Touch Points

Effective customer service benefits everyone—customers, agents, supervisors, and the company's bottom line. Deliver outstanding and consistent service and support across many channels including phone, email, the Web, and chat.



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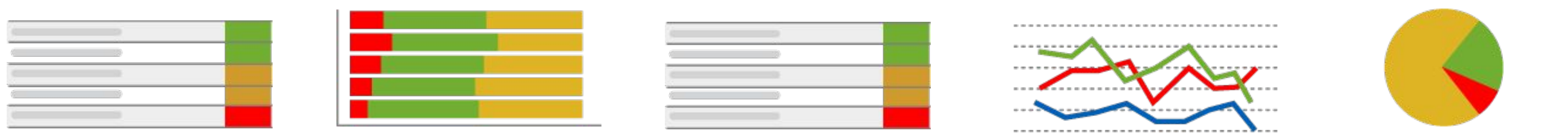
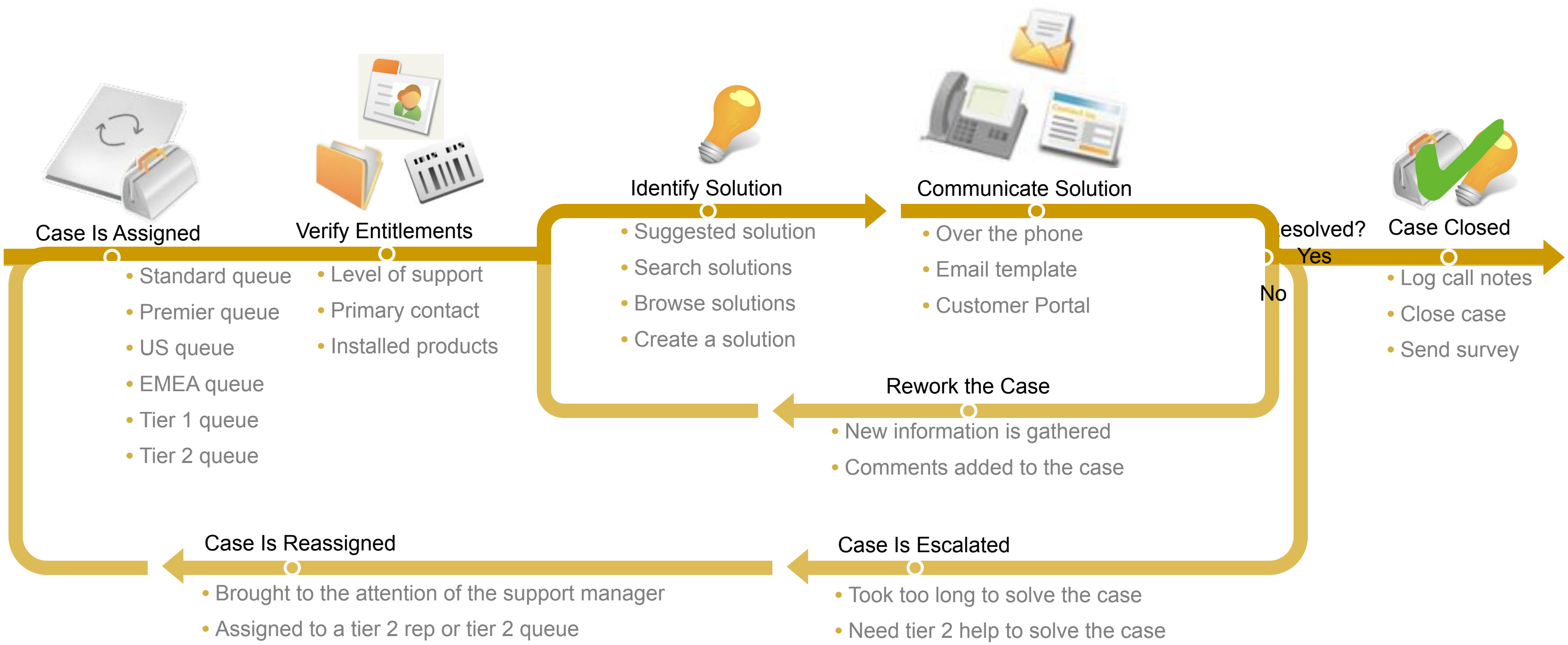
Streamline Your Case Resolution Process

Make sure your service and support organization operates with maximum efficiency and accuracy. Streamline complex customer service processes, automate workflow, and increase service quality and consistency.



Top Agents **Case Status** **Most Used Solutions** **Avg. Response Time** **Customer Satisfaction**



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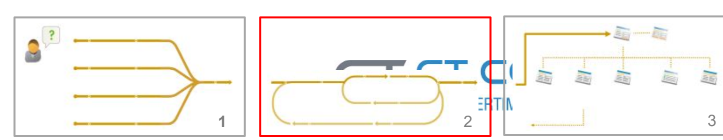
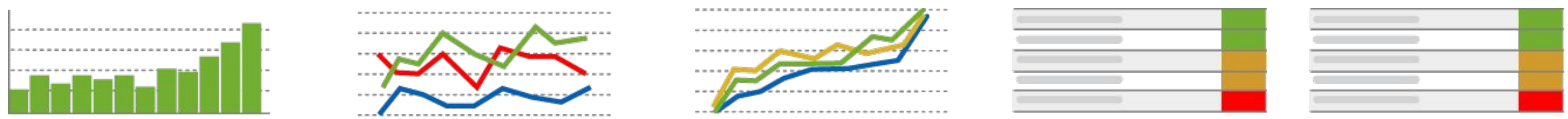


Provide 24/7 Self-Service Support with the Customer Portal

In an increasingly connected world, customer self-service has become a way of life. Drive greater customer loyalty through customer-driven communities and unprecedented online access to information and resources.



# of Customer Logins | **Self-Service Transactions** | **# of Posts, Comments, Votes** | **Popular Ideas** | **Top Contributors**

Use your Web site and email correspondence to drive customers to the self-service portal, where they can log cases, check the status of cases, and connect with the online community

Customer Portal Login

Self-Registration

My Home Page

You can create multiple portals for different types of customers each, with its own custom home page

My Cases

Customers can log a case online and come back to check the status or case history

Knowledgebase

Users can search or browse through solutions in the online knowledgebase and provide feedback on those solutions they found helpful

Salesforce Ideas

Let customers post, vote on, and discuss ideas with one another: you can capture feedback or manage feature requests

Custom Apps

With the standard customer portal you can deploy your own custom applications to customers

New Case is Created

Cases logged to the portal will be routed and assigned to a queue for an agent to work

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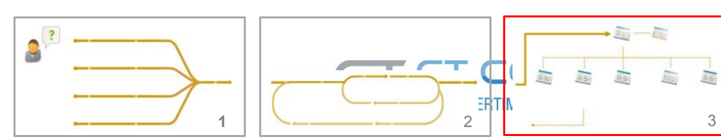

Call Center: Tools and Terminology

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Cases

A case is a detailed description of a customer's feedback, problem, or question. Your organization can use cases to track and solve your customers' issues.

Solutions

A solution is a detailed description of a customer issue and the resolution of that issue. The collection of your organization's solutions is sometimes referred to as the solution knowledge base. Solution managers, administrators, and users with the appropriate permissions can create, review, and categorize solutions. They can also publish solutions to the Self-Service portal and public knowledge base.

Products

Products are the individual items that have been sold to a customer. Understanding what products a customer has and what is under warranty can help solve the case more efficiently.

Search

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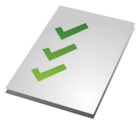

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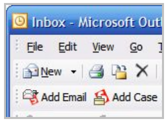

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Customer Portal

A Customer Portal provides an online support channel for your customers—allowing them to resolve their inquiries without contacting a customer service representative. Customer Portal has functionality similar to Salesforce. With a Customer Portal, you can also customize and deliver a visually stunning user interface to your customers.

Self-Registration

With Winter '08, you can enable your customers to self-register for access to the portal, increasing administrative productivity and improving customer loyalty by increasing self-service capabilities. If you want to use an existing authentication system, we also offer single sign-on integration.

Personalized Portals

You can create multiple personalized portals for any customer segment. Set up uniquely branded portals customized to the needs of distinct customer groups or VIP customers, or product-specific portals to engage customers of each product. Alternatively, you can enable customers to log on to the distinctly branded portals of your multiple business units, while you maintain a single customer database. With personalized portals, you can create as many unique experiences as your business model requires.

My Profile

Streamline the customer experience by allowing portal users to update their own user profiles. Portal users can view and edit their user and contact information, thus reassuring both you and your users that their information is accurate and up to date.

Cases in the Portal

In addition to logging and viewing cases, you can now allow your customers to edit or even close their cases, search for cases, and associate cases to existing assets.

Solution Knowledgebase

Portal users can also search and browse for rich content solutions in your knowledge base. With Suggested solutions you can automatically display matching solutions when a customer creates a case through the portal, and guide the user to close the case if one of the solutions solves the problem.

Salesforce Ideas

Salesforce Ideas reinvents the way that organizations source ideas from their communities. The new Salesforce Ideas on-demand application helps companies build their own online communities to collaborate directly with customers, partners, employees, or other constituents in an interactive, online forum.

Custom Apps

Create and deliver entirely new self-service processes—going well beyond cases and solutions— with custom objects and tabs. You can expose custom objects and tabs created in Salesforce to your customers in the customer portal to meet the unique customer service and support requirements of your organization and your industry.

Activity Management

Process Maps

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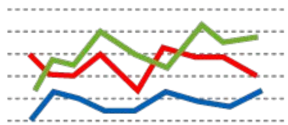
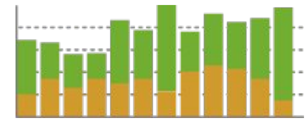
Respond to Calls with Confidence

When you get a call, start by searching Salesforce. You can quickly review the account and see who else at your company has been working with them. You can then use Salesforce to capture call notes and create a follow-up task if need be.

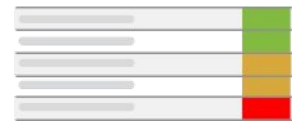


# of Calls

Sales



Customer History



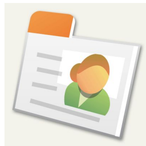
Follow Up Tasks

You Receive an Inbound Call

- Customer has some questions
- Prospect finally calls you back
- A call is transferred to you from a coworker

Search Salesforce

- Last name
- Phone number
- Company name
- Account number
- Email address
- CTI integration



Find Contact

If contact doesn't exist, create a new contact in Salesforce

Review Account Information

- Open tasks
- Activity history
- Opportunity history
- Case history

Take Action

- Update information
- Log call notes
- Create follow-up tasks
- Schedule an event
- Send an email

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Connect with Outlook and Capture Important Emails

You can use Outlook email to communicate with customers while easily capturing everything in Salesforce at the same time for organization-wide visibility. Add incoming or outgoing Outlook emails to the appropriate record in Salesforce with a single click in Outlook.

Outlook Email (Inbound)

- Outlook Email Inbox
- Add Email to Salesforce
- Create a Case

Outlook Email (Outbound)

- Outlook Email Editor
- Salesforce Address Book
- Send and Add to Salesforce

Salesforce Email (Outbound)

- Email Templates
- Mass Email
- Email Tracking

You Receive an Email

- Customer has a question about a proposal
- Prospect replies to an email and wants to set up a demo
- Partner has an update on a deal you've been working together

Read the Email in Outlook

Delete or Add Email

Automatically find the contact in Salesforce based on email address

Reply to the Email

Send or Send and Add

With knowledge in hand, you can reply to the customers' email

Associate the email with a opportunity, case, or even a custom object

Shared Activity History

Shared Activity History

View the Contact

- Phone number
- Job title

Review Account

- Open tasks
- Activity history
- Opportunity history
- Case history

Take Action

- Log call notes
- Update account information
- Create follow-up tasks
- Schedule an event
- Send an email

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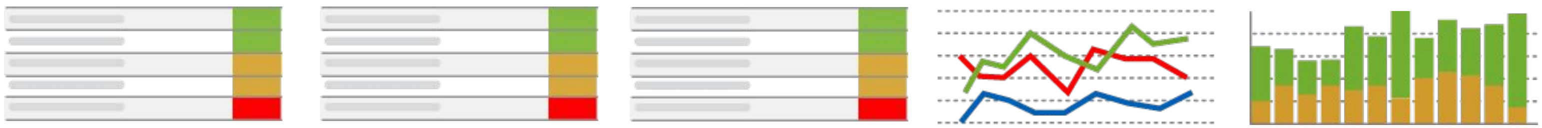
Manage Your Tasks and Follow-Up Activities

Coordinating customer-facing activities is a critical part of closing business and managing customer relationships. Salesforce's activity management capabilities help keep your team organized and working together so your customers receive the attention they need.



My Prioritized Task List | **My Top Opportunities** | **My Top Customers** | **# of Activities** | **Sales Trends**

Manage Your Task List

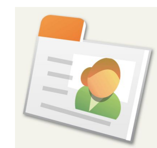
- Follow-up reminders you set for yourself
- Tasks assigned to you by a colleague
- Tasks automatically assigned to you based upon a workflow rule or an automatic trigger

Open a Task

- Task description
- Assigned by
- Due date
- Related to

Review the Account

- Open tasks
- Activity history
- Opportunity history
- Case history



View the Contact

- Phone number
- Email address

Take Action

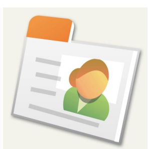
- Log call notes
- Update account information
- Create follow-up tasks
- Schedule an event
- Send an email

Salesforce Tools & Terminology – Activity Management

Below you'll find the tools & terminology used in the application and online training. Professional, Enterprise, and Unlimited Edition customers can re-name standard tabs and fields to reflect their company's terminology. For more information, search Successforce.com.

Accounts

Accounts are your organization's customers, competitors, and partners. Each account stores information such as name, address, and phone numbers. For each account, you can store related information such as opportunities, activities, cases, partners, contracts, and notes.



Contacts

Contacts are all of the individuals associated with your business accounts that you need to track in Salesforce. You can store various information for a contact, such as phone numbers, addresses, titles, and roles in a deal.

Task

Tasks are to-do items that need to be followed up on. They can be associated with accounts, contacts, leads, or other custom objects. You can follow up on the task yourself, or assign it to another user.

Activities

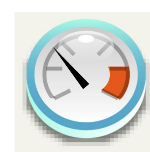
Maintain a historical record of all activities related to an account, contact, or opportunity. Your activity history includes emails, call notes, and calendar events, so everyone is on the same page.

Calendar Events

Group calendaring will helps you better collaborate as a team, and arrange meetings with prospects and customers.

Reports

Reports are lists, summaries, and analyses of your data, which you can display or print. To help you monitor your organization, Salesforce offers a wide range of standard reports, accessible in the Reports tab. You can also create new custom reports to access exactly the information you need. You can subtotal and limit your data to help you analyze trends and get a concise picture of what is happening in your organization.



Dashboards

Dashboards give you a real-time snapshot of corporate metrics and key performance indicators. A dashboard is a group of different charts (or components) that graphically display your custom report data. You can select up to 20 different custom reports to display data graphically as charts in each dashboard.

Search

Make searching data and interacting with the results of your searches simple, smooth, and highly effective. Inline paging and sorting features simplify the task of working with large sets of search results. Powerful filtering and scoping functions narrow searches and results. Customization options enable users to design search results layouts that are tailored for the way they work.

Salesforce Tools & Terminology – Activity Management

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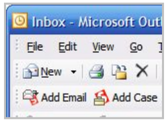


Connect Outlook

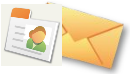
Outlook users enjoy high levels of productivity with Apex Connect Outlook—formerly called Outlook Edition—which makes it easy to synchronize important customer data between two commonly used applications. With Connect Outlook 3.0 in Spring '07, productivity for Outlook users gets another boost with several enhancements. Users can add emails with attachments, create contacts and leads directly in Outlook, and create relationships between calendar events and associated objects such as accounts and opportunities.

Web-to-Lead Form

You can set up a Web-to-Lead form to capture contact me requests from your company's website. With a lead de-dupe solution you can automatically route those requests to the person who owns the account.

CTI Integration

With computer-telephony integration (CTI) capabilities, you can directly integrate your telephone network into Salesforce and access it entirely through the familiar, browser-based Salesforce interface. With the combined power of CTI and the new Salesforce Console, salesforce.com delivers unlimited productivity to your call centers.



Email Templates

With Salesforce you can create email templates for common emails such as web-to-lead responses, sales prospecting, announcements, and internal workflow. You can even personalize parts of the email with information from the contact or account record.

Mass Email

Plan and execute email campaigns targeted at prospects and customers. Enterprise Edition customers can send 500 emails per mass mailing, while Unlimited Edition customers can send 1,000 emails per mass mailing. Salesforce can also integrate with third-party marketing solutions and offers out-of-the-box integration with several top email marketing vendors.

Email Tracking

Evaluate the success of email campaigns with integrated response tracking and easy monitoring of key campaign metrics, such as whether recipients open the messages, when they open them, and more.

Import Wizard

The ability to easily import data into Salesforce is one of the application's key benefits. Import excel worksheets or CSV (comma separated value) files. Map the information to leads, contacts, accounts, solutions, and custom objects. Search Import Tools on Successforce.com for more information.

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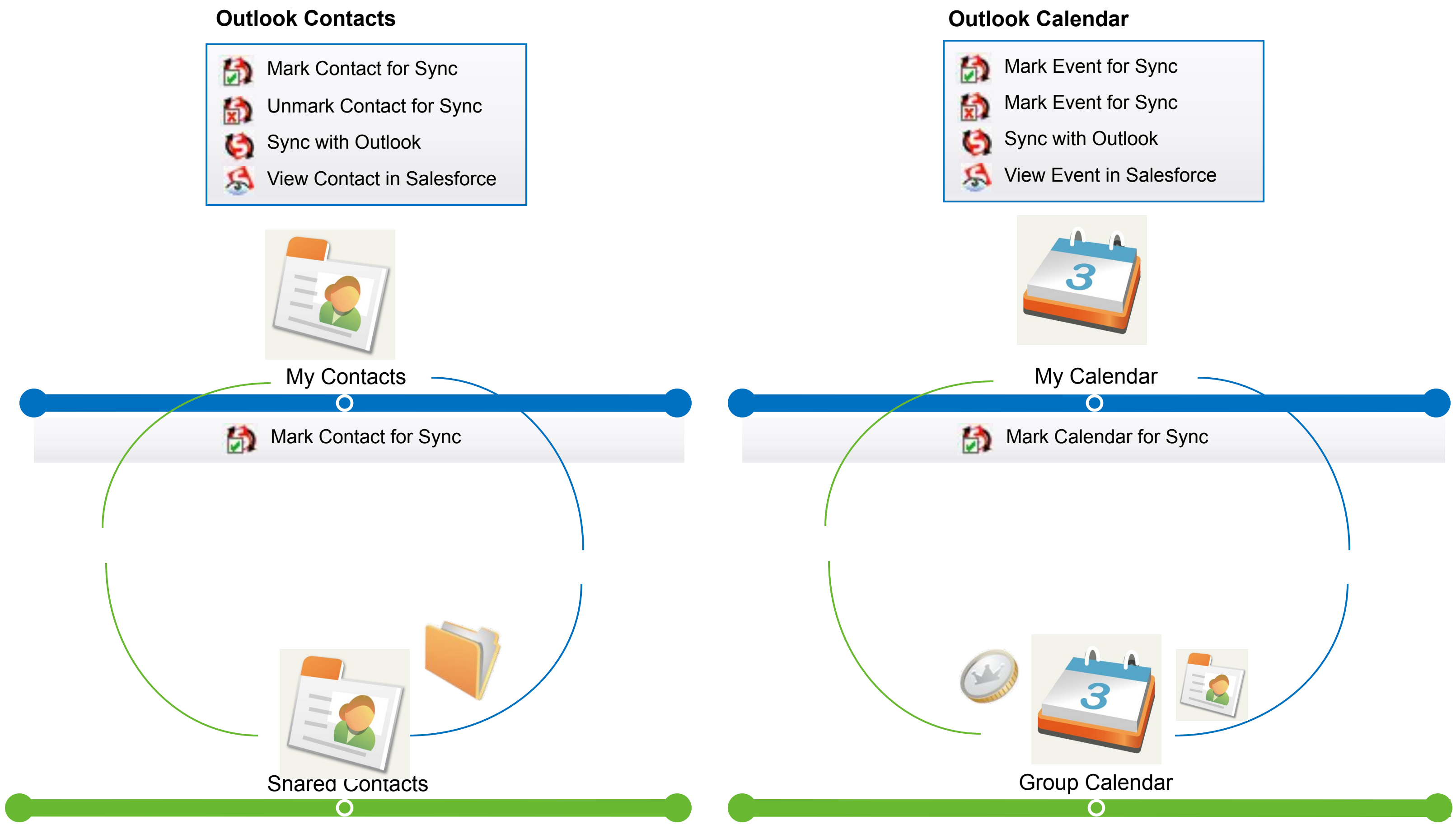
CUSTOMERTIMES CONSULTING AGENCY

Sync Your Contacts and Calendar Events with Outlook

Salesforce provides synchronization capabilities for Outlook's address book and calendar. Install Force.com Connect for Microsoft Outlook to keep all your contacts and activities up to date in both places.



Salesforce gives your entire company a 360-degree view of each of your customers, enabling everyone to acquire deep knowledge of every account, facilitate collaboration across your organization, and build and maintain strong, lasting customer relationships.

Group calendaring helps your employees better collaborate and work together as a team, as well as arrange meetings with prospects and customers more efficiently. For example, a telesales rep who is qualifying a prospect over the phone can at the same time schedule a follow-up meeting for a field sales rep by accessing an individual rep's calendar or the team calendar for all field reps in the region.

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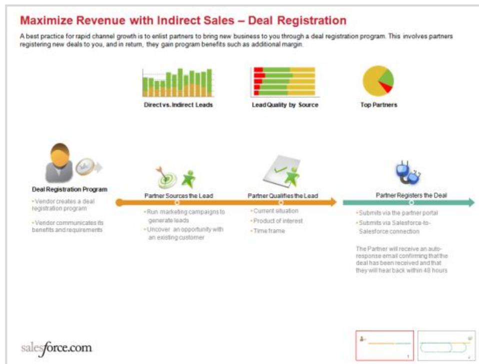
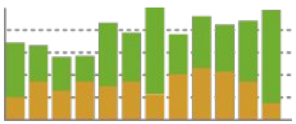
PRM

Process Maps

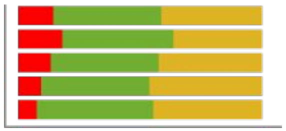


Maximize Revenue with Indirect Sales – Deal Registration

A best practice for rapid channel growth is to enlist partners to bring new business to you through a deal registration program. This involves partners registering new deals to you, and in return, they gain program benefits such as additional margin.



Direct vs. Indirect Leads



Lead Quality by Source

Top Partners

Deal Registration Program

- Vendor creates a deal registration program
- Vendor communicates its benefits and requirements

Partner Sources the Lead

- Run marketing campaigns to generate leads
- Uncover an opportunity with an existing customer

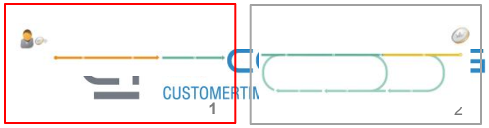
Partner Qualifies the Lead

- Current situation
- Product of interest
- Time frame

Partner Registers the Deal

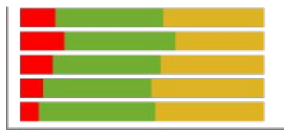
- Submits via the partner portal
- Submits via Salesforce-to-Salesforce connection

The Partner will receive an auto-response email confirming that the deal has been received and that they will hear back within 48 hours

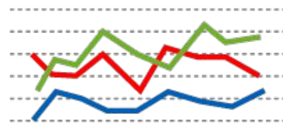


Gain Better Visibility into Your Channel – Deal Registration

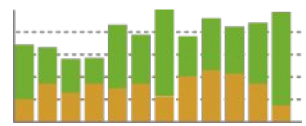
Get real-time visibility into the status of partner-owned opportunities while empowering partners with direct access to price books and opportunity information. Salesforce is the single place for updating deal information, tracking milestones, and recording all opportunity-related interactions.



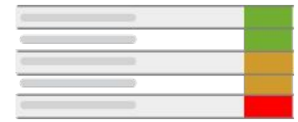
Deal Status



Sales by Partner



Indirect vs. Direct Sales



Partner Scorecard

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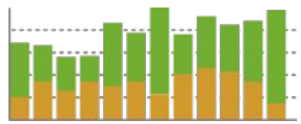
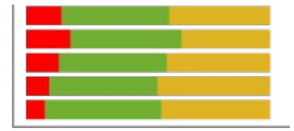
Maximize Revenue with Indirect Sales – Lead Distribution

Put an end to competitive issues and conflicts in your channel sales and earn partner loyalty and better deals. Distributing the right leads to the right partners and measuring success is a critical element in channel programs and partner success.

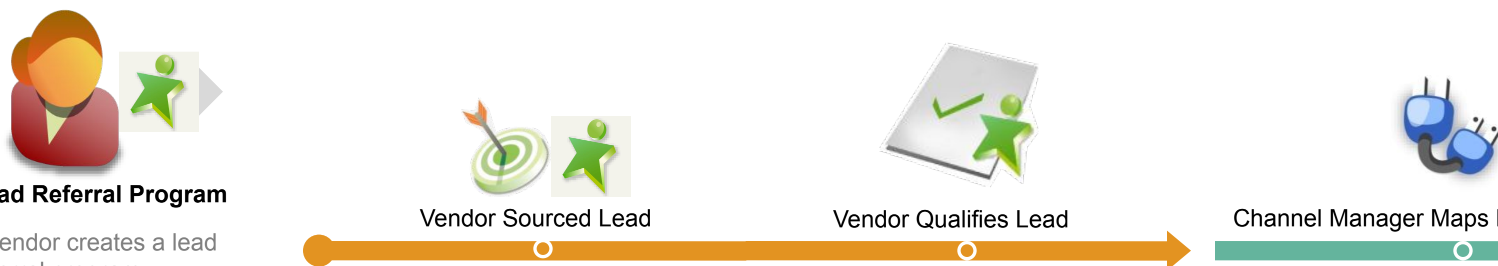


Direct vs. Indirect Leads



Lead Quality by Source

Top Partners



Lead Referral Program

- Vendor creates a lead referral program
- Vendor signs up lead referral partners

Vendor Sourced Lead

- Run marketing campaigns to generate leads
- Uncover an opportunity with an existing customer

Vendor Qualifies Lead

- Current situation
- Product of interest
- Time frame

Channel Manager Maps Lead to Partners

- Specific rep
- Specific partner
- Group of partners: shark tank

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Gain Better Visibility into Your Channel – Lead Distribution

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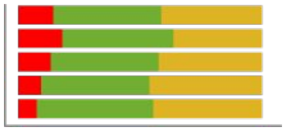
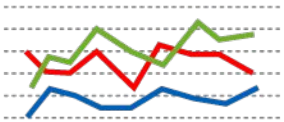
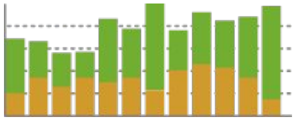


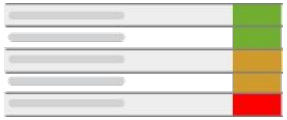
Deal Status



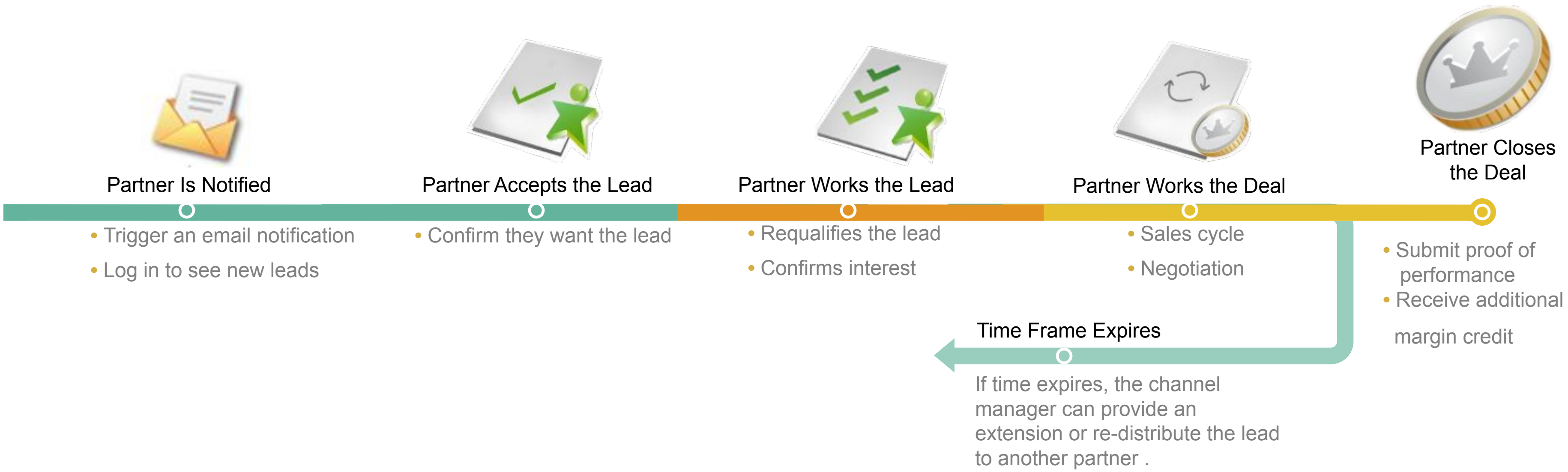
Sales by Partner



Indirect vs. Direct Sales



Partner Scorecard



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