

SALESFORCE CRM



A low-angle, black and white photograph of several skyscrapers reaching towards the sky. The perspective creates a sense of height and scale. A white rectangular frame is centered over the image, containing the title text.

01 What is Salesforce CRM

What is Salesforce CRM?

Salesforce CRM (Customer Relationship Management) is a cloud based platform that helps businesses manage customer interactions and data across sales, customer service, marketing, and more. A **cloud-based platform** means that the software and data are hosted on remote servers (the "cloud") rather than on a local computer or on-premise servers. Users access the platform through the internet, allowing them to work from anywhere and on any device with an internet connection. Salesforce CRM enables companies to improve customer satisfaction and streamline operations by integrating data from various sources, supporting collaboration among teams, and providing powerful analytics to make informed, data-driven decisions.

A low-angle, black and white photograph of several skyscrapers reaching towards a dark sky. The perspective creates a sense of height and scale. The buildings are silhouetted against a slightly lighter sky, with some windows reflecting light.

02

Core
Purpose of
Salesforce
CRM

Core Purpose of Salesforce CRM

The core purpose of Salesforce is to help businesses manage customer relationships and improve operational efficiency. It provides a centralized platform to store and organize customer data, track sales opportunities, and streamline processes through automation. By automating workflows like follow-ups and data entry, Salesforce saves time, reduces errors, and allows teams to focus on building relationships and closing deals. This improves both productivity and customer satisfaction, as businesses can respond faster and more effectively to customer needs.

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03

Key
Features of
Salesforce
CRM

Key Features of Salesforce CRM

- **Lead and Contact Management:** Stores customer details, interactions, and preferences, enabling teams to build strong, personalized relationships.
- **Sales Automation:** Assists sales teams by prioritising tasks, setting reminders, and tracking deals through every stage, helping them stay organized and focus on high-priority opportunities.
- **Reports and Dashboards:** Offers real-time insights and visual reports, allowing businesses to monitor performance, track KPIs, and make data-driven decisions quickly and accurately.

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04 Salesforce Clouds

Salesforce Clouds

Sales Cloud: Salesforce platform focused on managing sales activities and optimising the sales process. It helps sales teams track leads, manage customer accounts, and monitor opportunities as they move through the sales pipeline. With features like task automation, real-time insights, and forecasting tools, Sales Cloud enables teams to prioritise high-potential deals, stay organised, and close deals faster. It also includes customizable reports and dashboards, allowing sales managers to make informed decisions and improve sales performance.

Salesforce Clouds

Service Cloud: Salesforce platform designed to help companies improve their customer service. It provides tools for managing and resolving customer inquiries, automating service workflows, and offering personalised support across various channels like email, chat, and social media. Service Cloud also includes knowledge bases, case tracking, and AI-powered insights to help agents provide faster and more accurate assistance. By streamlining customer support processes, Service Cloud enhances customer satisfaction and loyalty.

Salesforce Clouds

Marketing Cloud: Marketing Cloud is Salesforce's platform for managing and automating marketing activities. It provides tools to create, personalize, and analyze campaigns across email, social media, mobile, and digital advertising channels. Marketing Cloud allows businesses to collect and use customer data to deliver targeted messages and experiences, track customer journeys, and measure campaign performance in real-time. This helps companies connect with their audience more effectively, ensuring consistent, personalized communication throughout the customer lifecycle.

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05 Customisability and AppExchange

Customiseability and App Exchange

Salesforce is highly customisable, allowing businesses to tailor the platform to their unique needs. Through its AppExchange marketplace, users can access thousands of third-party apps and tools that integrate seamlessly with Salesforce. This enables businesses to add specialized functionalities—like analytics, customer surveys, or industry-specific solutions—that extend Salesforce's capabilities, making it a versatile solution for various business requirements.

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06

Integration and Einstein AI

Integration and Einstein AI

Salesforce CRM integrates with various tools and uses AI such as Einstein AI in order to enhance productivity, predict trends, and improve decision-making.

Email Integration:

- Tools like **Outlook** and **Gmail** can be linked with Salesforce to sync emails, contacts, and calendars.
- Users can log emails directly into Salesforce records, track customer communications, and schedule follow-ups.

Accounting System Integration:

- Salesforce connects with accounting tools like **QuickBooks**, **Xero**, or **NetSuite** to synchronize financial data.
- This enables automatic updates of invoices, payments, and financial reports, improving transparency and reducing manual data entry.

Marketing Automation Tools:

- Integrations with platforms like **Pardot** or **HubSpot** align marketing efforts with sales by tracking campaign performance and customer interactions.
- Salesforce tracks customer journeys across various channels, providing data for personalized engagement.