WHITEPAPER

Eight CRM Essentials

An Executive Guide to the Eight Must-Have Elements of Every Successful CRM Initiative

Contents

Introduction

It's no secret that winning and retaining customers is the key to business growth and success. But that's no small feat given the dynamic and ever-increasing customer demands that companies face today, as well as the difficulty of implementing and enforcing processes to effectively support your interactions with prospects, customers, and partners. Fortunately, there are dozens of technology products devoted to helping companies manage those critical relationships—commonly known as customer relationship management or CRM.

To thrive, companies must focus on customer relationships and CRM strategies. For the most successful companies, CRM is an area of continual innovation and assessment. And your CRM processes and technologies must keep pace with—or ideally stay ahead of—changes in your market and customer base.

If you are searching for the right CRM technology for your business, re-evaluating your current use of CRM, or looking to derive more value from an existing investment, understanding the essential factors of CRM success can help you get the best results.

This guide to eight proven CRM essentials distills best practices, lessons learned, and collective insights from salesforce.com's 35,000+ customers—as well as industry experts—across various company sizes, geographies, and vertical markets.

The Eight CRM Essentials

1. Rapid time to value
2. Point-and-click customization
3. A 360-degree customer view
4. Real-time visibility
5. No more dirty data
6. High adoption
7. Extending your success
8. A broad community

Whether you are a Fortune 100 company or a one-person outfit, if your business cares about cultivating strong customer relationships, these essential elements of successful CRM provide valuable guidance for your own CRM initiatives.

CRM Success Stories		
24 Hour Fitness	Cognos	Kelly Services
ADP	Corporate Express	Panasonic Network Services
AMD	Delta Dental	Quantum
Air Products	Electronic Arts	Ryder System
Avis Budget Group	Expedia Corporate Travel	Sprint Nextel
Borland	Genesys Conferencing	SunEdison
Cars.com	Harris Interactive	SunTrust Banks
Chase Paymentech Solutions	Hitachi Software	Symantec
Chrysler Financial	The HoneyBaked Ham Company of Georgia	Time Warner Cable Business Class
Cisco	Kaiser Permanente	Yamaha Corporation of America

CRM Essential #1: Rapid Time to Value

Instant messaging, 24/7 customer service, shorter development cycles… today, businesses and their customers move at a rapid clip. Buy decisions are made quickly, and in fact entire businesses can succeed or fail in a matter of weeks. That means that the no one has the luxury of waiting months or even years to install a traditional, expensive, client/server CRM application. The competitive advantage today is on-demand CRM.

On-demand CRM solutions are better suited to today's fast-moving businesses. You can be up-and-running with on-demand CRM in a matter of weeks, so you can focus on delivering greater value to customers, rather than worrying about installing and maintaining hardware and software.

Unfortunately, many companies do exactly that—spend too much time managing IT infrastructure and not enough time on the business. According to Gartner, "Eight out of 10 dollars you spend in IT is dead because, while it is keeping the lights on, it isn't directly contributing to your business growth or to enhancing your competitive advantage." ["The 2006 Gartner Symposium Keynote: IT Must Think Differently, Act Differently and Be Different to Drive Business Growth," by Mark Raskino, et. al., October 19, 2006.] With no software to install or upgrade and no hardware to house and manage, on-demand CRM frees IT to be more innovative, responsive, and strategic for your organization.

By leveraging an agile, on-demand platform, you begin seeing the benefits of CRM immediately.

- Concentrate on your business initiatives. There's no hardware or software to buy or install.
- Let your users get started right away. Born-on-the-Web CRM solutions are as easy to use as the consumer Web—anyone familiar with Amazon.com or My Yahoo! will be comfortable with the Web interface of on-demand CRM.
- Accommodate global requirements quickly. You can manage multiple languages and currencies as easily as English and U.S. dollars.
- Get a custom solution for your specific needs quickly. With a few clicks of the mouse, you can make departmental, regional, or global changes; add custom data fields, new users, and workflow rules; and even create new applications.

With the on-demand model, customer-facing employees—and strapped IT teams—no longer have to get embroiled in complicated, time-consuming, high maintenance technology projects. Not only does on-demand CRM deliver numerous business benefits, it does so quickly and with minimal distractions and hassles for your busy teams, so they can focus on your business, not on technology.

CASE STUDY:
Ryder System Accelerates Close Rates and Increases Contract Renewals

As a Fortune 500 provider of leading-edge transportation logistics and supply chain management solutions worldwide, Ryder wanted to enhance business processes and measure CRM in its supply chain solutions division. Multiple silos of customer information and a lack of visibility into its global sales pipeline hindered the company's effectiveness in retaining customers, responding to opportunities, and closing deals. The most compelling CRM solution for them was a Web-based one so that they could quickly deploy it without getting internal IT staff involved.

"Sales visibility was non-existent and processes were all very manual prior to Salesforce," says Hernan Vera, group director at Ryder. "We implemented Salesforce in 30 days, and we have seen increasing benefits ever since."

> "Salesforce helped us deliver leads that have resulted in more than $200 million in proposals to our salespeople… we've seen **significant improvements in our retention of contracts**, on the multimillion-dollar level."
>
> — Hernan Vera
> Group Director
> Ryder System

CRM Essential #2: Point-and-Click Customization

No CRM solution is going to fit like a glove right out of the box, because the reality is that no two companies' customer relationships and processes are exactly alike. However, because many traditional CRM solutions are difficult and expensive to customize, some organizations are forced to alter their business processes to fit the capabilities of their CRM technology. The key to success is a highly flexible CRM solution that allows you to keep pace with changing customer needs and your evolving business environment.

On-demand CRM is uniquely suited to adapt to changing needs in real time. No matter what type of business you're in, how big or small your company is, or how unique your customer relationships are, your organization will benefit from the flexibility that the on-demand model provides.

- Configure any field, workflow rule, page layout, or report with a few clicks. Implement changes for specific users and teams, and take control of the entire customer lifecycle—marketing campaigns, leads, opportunities, customer service and support, etc.
- Create custom applications for your unique processes or add other best-of-breed on-demand applications—without programming.
- Roll out CRM in additional languages and currencies instantly for your colleagues in other geographies.

The ease with which we can point and click our way to customizing consumer Web pages has dramatically raised everyone's expectations for implementing changes even in business applications. Only the on-demand model can accommodate quick customizations on an ongoing basis, making the weeks or months it takes to make even simple changes to traditional software seem hopelessly old-fashioned.

"By customizing Salesforce we've been able to break down what we offer our clients feature by feature and evaluate exactly what our clients are looking for, the advantage we can offer them, and what they require to close a deal."

— Senior Manager of Sales Support Spherion

CASE STUDY:
Spherion Finds Custom CRM a Good Fit for Services Tracking

Spherion is a leader in the North American staffing industry and was faced with challenges that ranged from last-minute contract concessions to costly project scope creep.

Custom CRM enabled Spherion to differentiate itself from its competition. "We're operating in a very competitive environment, and it's easy to be seen as just one more company that does staffing," says a senior manager of sales support at Spherion. "By customizing Salesforce we've been able to break down what we offer our clients feature by feature and evaluate exactly what our clients are looking for, the advantages we can offer them, and what they require to close a deal."

CRM Essential #3: A 360-Degree Customer View

The quality of the customer experience makes and breaks companies. Customers are becoming increasingly demanding and sophisticated, and they'll take their business elsewhere if you don't deliver the superior service they feel they deserve. Companies today are challenged to integrate and manage the complete customer lifecycle—seamlessly and effectively—to win and retain those highly desirable most-profitable customers. For many companies, the underlying, proven formula for success involves using on-demand CRM across all those critical customer touch points.

Too often, sales, operations, marketing, customer service, help desk support, professional services, and other customer-facing organizations use disparate systems, so no one has a complete picture of the customer. With a multitenant, on-demand CRM solution, customer information and activities are easily unified and shared so that every department has a 360-degree view of the customer and can provide quicker, better service.

1. Leads go directly to the right **sales team** or individual rep, are well qualified, and include the right information.
2. **Marketing** gets real-time visibility into the status of every lead, sees which lead sources drive the most revenue, and plans appropriate customer marketing campaigns.
3. **Service and support** organizations get visibility into which products or services the customer is using and any pending sales opportunities, and can alert the sales team to potential cross-sell and up-sell opportunities.
4. Back in **sales**, reps get insight into any outstanding customer service issues so that there are no unpleasant surprises when they make their sales calls.

With a common CRM system, each department can be more effective and productive in every customer interaction, and each employee can put his/her best foot forward and provide superior, consistent service.

Sample CRM Processes Enabled with Salesforce

- Sales cycle management
- Sales succession planning
- Web site lead capture
- Lead conversion
- Opportunity management
- Sales forecasting
- Account planning
- Activity management
- Territory management
- Routing leads to partners
- Sales performance analysis

- Customer feedback collection and analysis
- Customer segmentation
- Campaign creation and management
- Email campaigns
- Events management
- Campaign response analysis
- Document management
- Knowledge management

- Partner management
- Case management
- Complaint management
- Service performance analysis
- Asset management
- Contract management
- Web site case capture
- Agent performance management
- Customer self-service
- Solution management

CASE STUDY:
Harris Interactive Improves Forecasting Capabilities 100 Percent

Harris Interactive needed to manage its sales teams and operations more effectively. It also needed to scale resources to contain costs and improve cross-functional support. This required improving communication. To achieve this goal, the company required a common system that everyone in the company—from sales and marketing to research and finance—could use to access client information.

Since the rollout of Salesforce, global access to sales information has enabled better supply-chain planning. For instance, supply-chain efficiency has doubled. And sales forecasting accuracy, which Dan Chiazza, Harris Interactive’s senior manager of global sales and database operations, says used to be “highly unpredictable,” has improved “100 percent, thanks to advanced pipeline management.”

> “Ask our president, and he’ll say Salesforce is the most important application in the organization. All sales and marketing-related functions manage their day through the application.”
>
> — Dan Chiazza
> Director, Global Sales Operations
> Harris Interactive

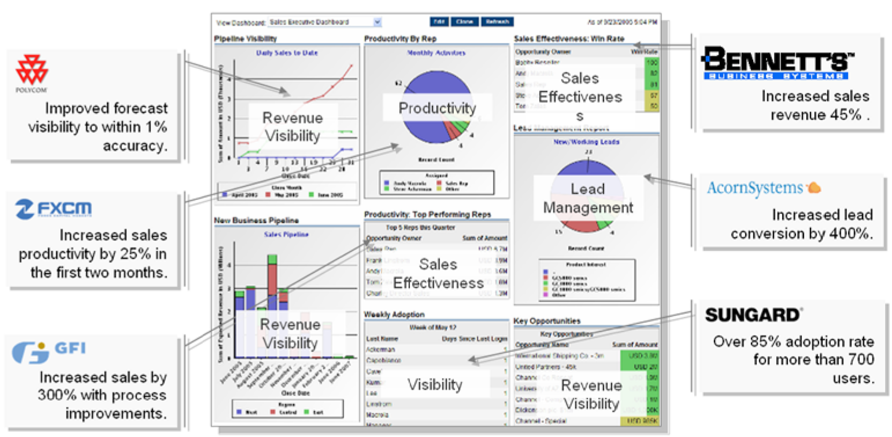
CRM Essential #4: Real-Time Visibility

To stay competitive, businesses must “mind their metrics.” Constantly monitoring the health of the business, determining what’s working and what’s not, and making adjustments to improve operations and increase revenue are essential to surviving and thriving in today’s competitive market. As easy as it sounds, every executive knows that too often, it’s difficult or impossible to get the timely analysis you need to effectively run the business.

With traditional enterprise software, getting tailored reports usually requires IT involvement and days or weeks of waiting. With on-demand CRM, business intelligence is democratized. Executives and managers finally have instant visibility into all aspects of the business—everything from a bird’s-eye view to the micro-level details. Running reports and setting up real-time dashboards require just a few clicks. No more consolidating disparate spreadsheets and working with data that’s days or weeks old. Executives in every department can get the total customer insight they need to build a stronger, more profitable business.

- **Sales executives** get better insight into customer information and sales activities and finally have instant access to accurate pipeline information and forecasts. And with the ability to add partner relationship management, channel sales can be managed right alongside inside sales, for an integrated view of all your sales activities.
- **Marketing executives** can measure and manage the effectiveness of their campaigns and tie revenue back to individual marketing activities. Finally, marketing ROI is measurable.
- **Customer service and support executives** have access to up-to-the minute information about global service operations—such as agent performance and service quality—so that they can make the right adjustments and implement changes that will have a positive impact, quickly.

Dashboards for Success



“Dashboards are our lifeline. When you walk through our office, it's dashboard, dashboard, dashboard... 60-70% of our managers' time is spent in Salesforce dashboards.”
—Senior Manager, TransUnion

Analytics can be addictive, and there are literally hundreds of CRM metrics you can track. Your CRM metrics should track to your organization’s other financial and business objectives. In addition, the CRM metrics you choose will be specific to your company’s size, product lifecycle, and your corporate mission. The key is to get good insight without becoming a slave to the metrics. To avoid that, it’s best to identify the smallest number of performance metrics that can still properly encapsulate the business objective.

For example, a new company with a promising but unknown product will need to invest heavily in marketing campaigns to solicit customers, build product awareness, and establish its brand. The company would want to keep close track of metrics such as new leads per marketing campaign, sales opportunities per campaign, and opportunities closed per campaign. On the other hand, a company with a well-established brand, a large customer base, and a mature portfolio of products would want to focus on metrics that help identify its most profitable customers and show which programs further increase their customers’ spending and ensure their loyalty. This company would want to track up-sells and cross-sells with metrics such as the number of products or services per customer and average profit per customer.

Even small investments in dashboards and reporting for all your customer-facing employees can have a profound impact on business performance. Metrics motivate.

Sample CRM Metrics to Monitor and Track Your Success

Sales Metrics

- Number of prospects
- Number of new customers
- Number of retained customers
- Number of open opportunities
- Close rate
- Renewal rate
- Number of sales calls
- Number of sales calls per opportunity
- Amount of new revenue
- Amount of recurring revenue
- Time to close by channel
- Margin
- Sales stage duration
- Sales cycle duration
- Number of proposals given
- Competitive knockouts

Service Metrics

- Cases closed same day
- Number of cases handled per agent
- Number of service calls
- Average number of service requests by type
- Average time to resolution
- Average number of service calls per day
- Percentage compliance with service-level agreement (SLA)
- Percentage of service renewals
- Complaint time to resolution

Marketing Metrics

- Number of campaigns
- Number of responses per campaign
- Number of purchases per campaign
- Revenue generated per campaign
- Cost per interaction per campaign
- Number of new leads per product
- Number of new customers per campaign
- Overall customer retention rate
- New customer retention rates
- Customer referrals
- Customer satisfaction level
- Propensity for customer defection

“Our account teams now share sales opportunities worldwide. By facilitating global collaboration, we can work together to close more deals, more quickly.”

— Marcus Johansson
MIS Project Leader, CRM
Genesys Conferencing

CASE STUDY:
Genesys Conferencing Maximizes Sales and Service Effectiveness

Genesys Conferencing is a leading provider of integrated Web, audio, and video conferencing services. They were challenged with a fragmented view of their 18,000+ customers and wanted to unify their global sales, marketing, and service information. There was no integration between the sales and customer service systems; each country required its own technology infrastructure to support the on-premise solutions; and global visibility into the business was haphazard.

Salesforce helped Genesys overcome these challenges. “The rich, pre-packaged functionality provided Genesys with global visibility into every account—including the status on every deal, a real-time view of every customer support issue, and an instant snapshot of our marketing campaigns,” says Marcus Johansson, MIS project leader, CRM, at Genesys.

CRM Essential #5: No More Dirty Data

Almost every company suffers from "dirty data" syndrome, and few have any idea what to do about it. Consider the findings of the IBM Global Data Management Survey of 600 major enterprises: 75 percent of the respondents reported significant problems as a result of defective data, including violated contract terms, failure to bill or collect for services or products delivered, delays in or abandonment of new systems projects, and extra accounting costs.

You can't be successful with CRM until you find a remedy to the data integrity problem that is prevalent in organizations of all sizes and in every industry. A three-step approach to quality data management can address this issue so that your CRM initiative will be free of dirty data.

1. **Capture.** If you don't capture it, you can't measure it. In order to capture all the data you need to get an accurate analysis of your business, you need everyone in the company to use your CRM system rather than store data in unintegrated or offline sources such as spreadsheets. To get quality data, high system adoption is critical. You can also capture customer information (such as leads) from your Web site to populate your CRM system.
2. **Clean.** Once you have the data in your CRM system, you need to continually weed out bad data by removing duplicates, synchronizing changing data, and updating information. You should have the flexibility to leverage data cleansing applications that tie in with your CRM.
3. **Augment.** Merely cleansing your data is not enough. Maintaining high data quality also means filling in the blanks. For example, some of your account records may be missing company information such as revenue, number of employees, key executives, and so on. You can augment your data by leveraging data service providers to help you fill in the gaps. Providing your teams with full details on their customers or potential customers in one spot makes them more effective at in-depth analysis and prospecting.

A centralized customer data repository is the critical foundation of any CRM initiative. As with any data-driven application, the quality of the data determines the achievable level of success. The creation of an accurate, timely, information-rich, centralized view of the customer across channels and lines of business is a key enabler for reducing costs, managing risk, and increasing revenue and profitability in customer-centric organizations.

Research shows CEOs around the globe are demanding this single view of the customer. Savvy executives know that clean customer data is much less costly than not having enough insight to make intelligent business decisions or losing customers to poor service. So what better time to kick off a project to whip your customer data into shape?

CASE STUDY:
Fios Drives Success with Data Quality

Fios Inc., a leading provider of technology-enabled electronic discovery services for law firms and large corporations, lacked the most up-to-date news and background information for customer calls and needed to extend its corporate database for selected target industries.

With Account Intelligence for AppExchange, every inside sales rep could populate the database with key contacts and targeted prospects in select industries, up-to-date news releases, and company information. The end results included:

- Access to c-level executives of target companies in seconds
- Saved time and a significant productivity boost for the inside sales team
- Reps that sound more competent
- Targeted prospect lists
- No lag time for implementation
- No ramp-up time for training

"Within 30 days of switching to Salesforce, we were able to do away with all Excel-based forecasting. What a difference!"

— Joe Aiello
Director of Corporate Systems
Fios Inc.

CRM Essential #6: High Adoption

There's nothing worse than investing in CRM and having no one show up. Too many CRM projects fail due to poor user adoption. After all, technology is only as good as the people who use it. To ensure that people do use your CRM system, it must be easy to use, accessible, and scalable, and significantly enhance productivity, efficiency, and visibility. On-demand CRM solutions that are delivered via a Web browser encourage adoption by replicating the familiar point-and-click interfaces of popular consumer Web sites, where everything must be user friendly.

A look at successful CRM initiatives uncovers several best practices for driving user adoption.

- **Build support for CRM early on.** You should communicate your CRM strategy and timeline to key stakeholders well in advance of the implementation to set expectations.
- **Go top down, bottom up, and sideways.** After securing an executive sponsor, have him or her send a communication to the company to reinforce the importance of the initiative and encourage participation. You should also cultivate active and vocal advocates/end users to drum up support among the troops and identify team project members from all affected areas of the organization.
- **Focus on people and processes.** You need to recruit people who know the day-to-day activities of your user community, work with them to thoroughly document business processes, and customize the CRM application to reflect those processes.
- **Make your users' lives easier.** It must be easy for users to sync information with their other productivity tools, like Microsoft Outlook. Integrating with related systems provides a one-stop-shop for all the information users need. And you can delight users by providing unexpected information of value, right when and where they need it. For example, when a user enters competitive information about a deal into the CRM application, point him/her to the location of materials on how to sell against that competitor.
- **Let them take it on the road.** For mobile employees such as field sales reps, nothing boosts productivity and user satisfaction more than providing CRM access from the field.
- **Keep it simple.** Provide users with information relevant to their everyday tasks. Don't overburden them with excess information that will distract them and impact productivity. Customize the views that each team and user type sees, so that an individual user sees only the information relevant to his/her role or project.
- **Train you users in advance.** You should develop online and custom training to reinforce your unique processes, roles, and terminology. Even the easiest-to-use CRM system benefits from custom training to show users how the system relates to your company.
- **Give executives—and everyone—a bird's-eye view.** Give every executive a dashboard that provides instant visibility into all the metrics he/she cares about. Empower every user to create his/her own reports without having to wait for the system administrator or IT team.
- **Reinforce adoption with carrots and sticks.** Build CRM usage with incentive programs such as spiffs, contests, etc. ("carrots"). And for those who are more motivated by fear, reinforce the importance of using CRM with "sticks," such as executive communications and programs that tie usage to highly desirable results, the most popular of which is to only pay commissions on opportunities that were created in the application. Validate adoption using reports, dashboards, and spot checks.
- **Give everyone a voice.** Encouraging feedback creates a sense of collective ownership and investment in the system. By encouraging feedback—and responding to it by customizing the application to incorporate good suggestions—is an excellent way to build adoption.

Investments in encouraging CRM adoption reap big rewards. Not only will you enforce your business processes and increase productivity, but the more your teams use CRM, the more valuable the data and analyses it produces will be.

> “With consistent performance and ease of use, **Salesforce enables us to react quickly to business needs on a global scale.** This translates to greater efficiencies and long-term success across our entire organization.”
>
> — Will Shortt
> Senior Director,
> Global Sales Infrastructure
> Symantec

CASE STUDY:
Symantec Drives Enterprise Success: 3,900 Users, 40 Countries, and 11 Languages

Symantec is a global leader in infrastructure software. When the company merged with Veritas Software, it had four disparate on-premise CRM systems, creating silos of customer data. Not only did Symantec need to consolidate these systems, but the company was faced with the demands of integrating Veritas’ sales reps into its existing sales force. A smooth unification was critical.

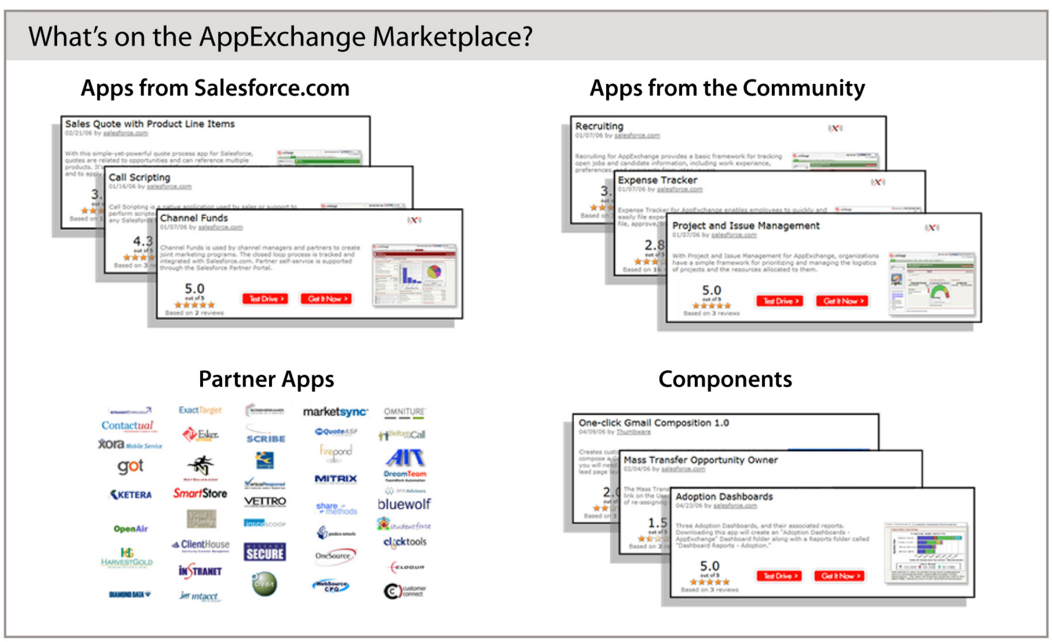
In the end, the evaluation project team chose to replace all existing systems with Salesforce for its ease of use and superior performance—even in remote sites. “Best practices were built into the system via the intuitive user interface, which made training and adoption quite easy. The salesforce.com on-demand delivery model was what we ultimately saw as key to getting the 3,900 people on one tool,” says Will Short, senior director of global sales infrastructure at Symantec.

CRM Essential #7: Extending Your Success

Business is about evolution. Smart and successful companies are flexible enough to adapt as necessary while never letting go of the core mission and values. If your business must be nimble to survive, why should you commit to a rigid, inflexible technology solution for something as important and core to your business as CRM? The ability to tie-in additional best-of-breed applications that address other key business initiatives and processes is essential to the long-term success of your CRM solution.

On-demand CRM embraces the latest Web services technologies so that companies can take the on-demand model beyond CRM by plugging in other Web solutions or even building custom on-demand applications easily and quickly.

With Salesforce CRM, for example, customers can find, test drive, and quickly install additional applications from the AppExchange. This unique marketplace offers hundreds of pre-integrated applications—from salesforce.com, developers, and partners—that supplement the core Salesforce CRM functionality or automate entirely different business processes, such as human resources, finance, administration, and operations. These applications have all the benefits of on-demand CRM: no infrastructure or hardware requirements, easy customization, real-time insight, and more.



CRM is not an island. Because it touches so many aspects of your business, you want to make sure that your CRM system can flexibly accommodate related processes and applications. Like many other companies, you may find that once you get started with on-demand and begin realizing the many benefits of the model, you will want to find other processes and applications to bring onto your on-demand platform.

> “It’s a simple yet highly sophisticated platform, and we quickly saw that it could be customized to fit our needs without the pain, cost, and timelines of the traditional solutions we considered.”
>
> — CIO
> Altium Limited

CASE STUDY:
Altium Creates and Deploys Six Critical Business Applications in Just Four Weeks with Salesforce Unlimited Edition and the Force.com Platform

Altium Limited, a leading developer of electronics design software, had just four weeks to get ready for its next peak business period. And although AltiumOne—the company’s existing homegrown system—normally performed adequately, the last peak period showed that it could not scale to meet the company’s increased demand.

Company executives discovered that Salesforce and the Force.com platform were philosophically aligned with their business in many ways. “It’s a simple yet highly sophisticated platform, and we quickly saw that it could be customized to fit our needs without the pain, cost, and timelines of the traditional solutions we considered,” explains Altium’s CIO.

For Altium, the AppExchange marketplace served as a fountain of ideas and as the springboard for the development of six applications that leveraged Altium’s .NET development environment and resources:

- **Quoting**. Altium customized a sales quote AppExchange application to create printed quotes with multiple product lines and multilingual content, with a layout that conforms to local postal requirements. This application also creates a sales order in Altium’s ERP system and routes it to the appropriate warehouse for shipment. The processed order is then fed back into Salesforce so that sales representatives can view the status of customer orders.
- **Purchase Orders**. Altium’s new purchase order system streamlines purchasing, improves the visibility of expenditures, and includes sophisticated workflow functionality.
- **Project Management**. Altium installed and customized a project and issue management AppExchange application to support the company’s unique business requirements for tracking complex global projects involving multiple groups and external partners.
- **Electronic Component Management**. Using multiple development tools included in Force.com Builder, this application tracks Altium’s inventory of electronic components such as capacitors, resistors, and diodes and maps each component to a series of purchase items from various suppliers, as well as to a series of electronic models such as 2-D printed-circuit-board footprints, 3-D models, and schematic symbols.
- **Customer Request and Campaign Management**. Developed with salesforce.com’s AJAX toolkit, this application allows customers to request downloads, product orders, support cases, and bookings for events through the company Web site, which is integrated with the system.
- **Support Case Management**. Altium used Salesforce’s powerful dashboard analytics to provide information to Altium’s global customer care department about pending support requests.

CRM Essential #8: A Broad Community

Community-building Web technologies and sites are some of the most popular and fastest-growing areas on the Internet today. Through blogs, wikis, social and business networking sites, and much more—people are increasingly engaging with each other online. At the same time, companies are realizing that nurturing their customer communities and engaging with customers can yield dramatic results in terms of customer loyalty and brand awareness. At the cross section of these two trends is on-demand CRM: the perfect enabler of community growth.

On-demand CRM solutions can help build and manage interactive, online communities. The interaction and feedback that are generated in the online forum can flow back into the CRM system for analyses that can guide decisions on improving the overall customer experience.

You can facilitate the growth of a strong customer community by providing online forums for a variety of topics of interest to your customers, including:

- **Best practices.** Encourage customers to share tips, tricks, success stories, and ideas, etc.
- **Ideas and voting.** You and your customers can share ideas on the future of your products and services. Providing the opportunity for customers to vote on ideas is an excellent way to get feedback, drum up participation, and help customers feel invested in your company’s future.
- **User groups.** You can set up local user groups and provide an online forum for communication and planning among the local members.

The power of the community is growing every day. Using an on-demand solution to help you build stronger relations with your various stakeholders is an easy way to harness that power to benefit your business.

> “Salesforce users are so generous when it comes to sharing info and helping one another succeed.”
>
> — David Resnick
> VP of Sales & Marketing
> TFC, Inc.

CASE STUDY:
Successforce.com Web Site Provides Dynamic Forum for Customers to Interact with Salesforce.com—and Each Other

As the world leader in on-demand CRM, salesforce.com knows a thing or two about building lasting relationships with its customers. In addition to the expertise of salesforce.com’s in-house experts, there is a wealth of knowledge in the customer community that Salesforce administrators and users are eager to tap into. Salesforce.com’s popular Successforce.com Web site is a dynamic forum in which customers share best practices, tips, and networking opportunities and access top-quality content contributed by product managers, and implementation experts.

Successforce.com message boards provide a variety of real-world perspectives in answer to customers’ burning questions. Written by salesforce.com product managers, the blogs provide a forum for learning about the latest best-practice ideas and product developments. By encouraging readers to post comments and questions, the blogs have become interactive conversations that benefit everyone.

The site’s innovative IdeaExchange, built using the Salesforce Ideas application, allows customers to post feature requests or entirely new product concepts that they’d like to see developed by salesforce.com or by a partner or developer. Other customers can comment and vote on the ideas, with the most popular ideas rising to the top. Salesforce.com product managers actively monitor the IdeaExchange, offering insight and soliciting feedback on development projects. The IdeaExchange is bringing democracy to product development and giving customers a greater—and more public—voice in the future of the Salesforce product.

Conclusion

No matter how large or small your company, these eight CRM essentials help you understand what successful CRM looks like. By considering these eight essentials in all stages of your project—from selecting a vendor to planning your implementation to tuning your solution and processes—you can enjoy the same level of success that tens of thousands of companies have already experienced with on-demand CRM.

Salesforce.com is the market and technology leader in on-demand business services. The company's Salesforce suite of on-demand CRM applications is redefining success for sales force automation, customer service and support, marketing automation, and partner relationship management.

To try on-demand CRM free for 30 days, go to: www.salesforce.com/freetrial.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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