

Customer Relationship Management

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Features

Customization

Email Marketing

Communication

Forecasting

Automation

Integrations

Pipelines

Data

Insights

Invoice

Customers

Colleagues

Security

Prospects

Partners

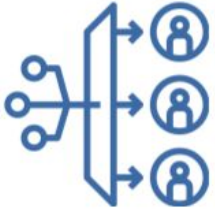
What is a CRM?

Leads

Deals

Technology

Processes



Customer Data



Leads
Generated



Personal
Information



Business
Management

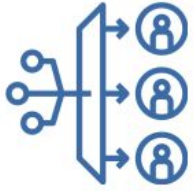


Marketing Team



Sales Team

Businesses without a CRM system struggle to manage scattered data from multiple sources.



Customer Data



Leads Generated



Personal Information



Business Management



Marketing Team



Sales Team



Using a CRM system, businesses can centralize data, enabling effective data utilization through the platform's tools.



One Efficient System

Stores
Organizes
Automates
Synchronizes





CRM



Better use of
company
resources

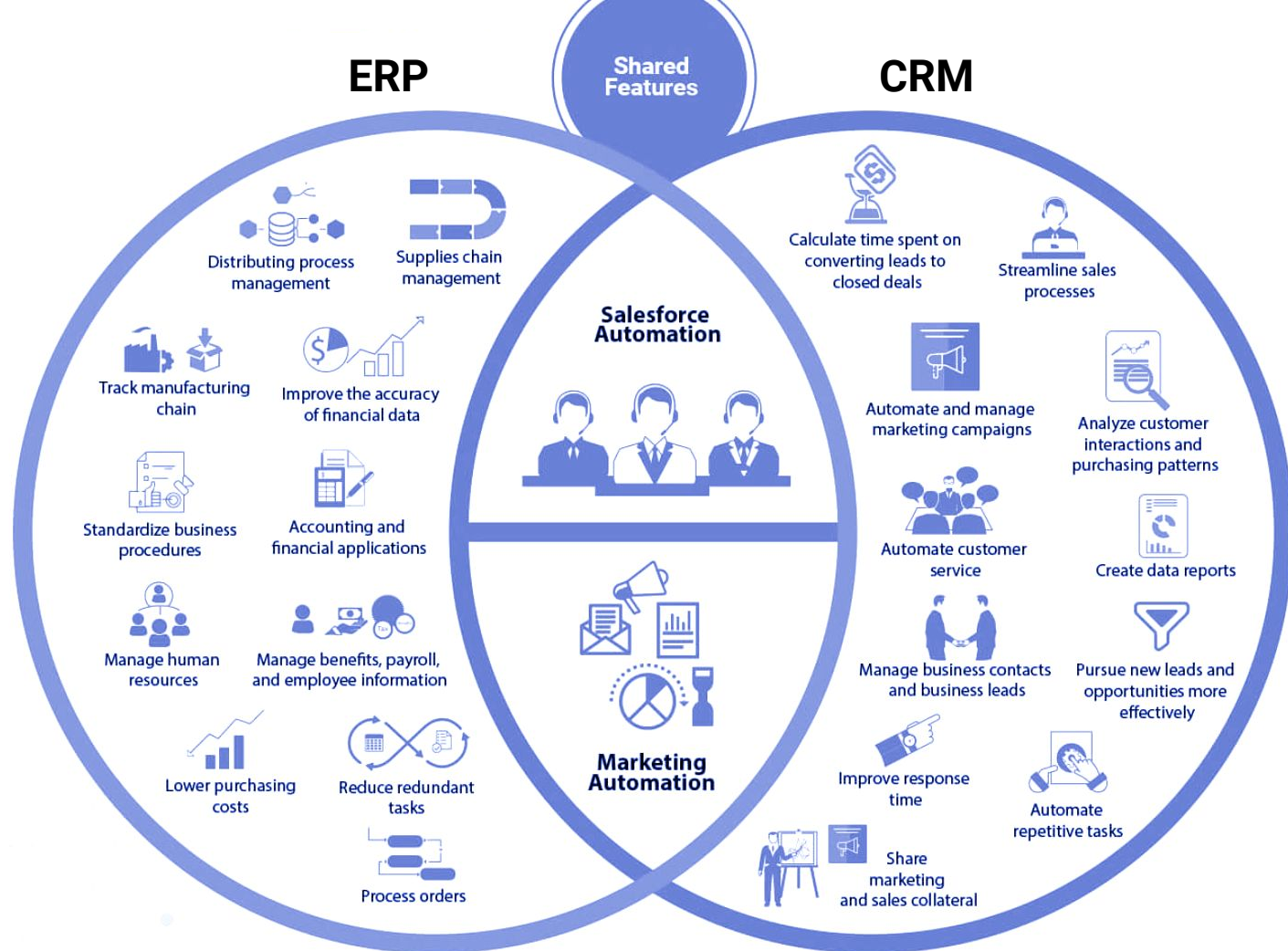


Increased revenue



Higher Customer
Satisfaction

What is the difference between a CRM and an ERP?



Top Features included in CRM

- Contact Management
- Lead Management
- Opportunity Management
- Sales Automation
- Email Integration
- Reporting and Analytics
- Customer Service and Support
- Workflow Automation
- Marketing Automation
- Customization and Scalability



Top CRM Softwares Comparison Chart

Feature	HubSpot	Salesforce	Keap	Pipeliner	Freshsales	Thryv	Pipedrive	Copper	Close	Nimble
Overall Feature Penetration	100%	91%	87%	78%	78%	74%	65%	61%	57%	48%
Email marketing Send bulk and automated emails	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Marketing Automation Start or stop campaigns automatically	✓	✓	✓	✓	✓	✓	✓	-	✓	✓
Sales Automation Automates sales qualification and follow-up	✓	✓	✓	✓	✓	-	✓	✓	-	-
Sales Engagement Prospect research and interactions	✓	✓	✓	-	✓	✓	-	✓	-	-
Contact Management Store extensive customer records	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Integration APIs Integrations with third-party tools	✓	✓	✓	✓	✓	-	✓	✓	✓	✓
Marketing Analytics Pre-made and custom reports	✓	✓	✓	✓	✓	-	-	✓	✓	-
Sales Pipeline Management Manage the stages of the buyer's journey	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Landing Pages Library of mobile optimized templates, build new with drag and drop features.	✓	✓	✓	-	✓	✓	-	-	-	-

The image shows the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" written in white lowercase letters inside it. The cloud has a soft drop shadow.

salesforce



Multi-Tenant Layer

common application for multiple clients
client's data is separate from other clients



Metadata Development Model

standard and custom configurations,
functionality, and code



API Services

custom objs/fields automatically create an API

Email Template Send Test and Verify Merge Fields

Subject Still interested in {!Property__c.Name}?

Plain Text Preview

Hi {!Contact.Name},

You recently favorited [{!Property__c.Name}](#) on [dreamhouse Realty.com](#). I'd love to talk with you more about this fantastic home. Feel free to give me a call so we can set up a viewing. Thanks!

Michelle Smith
Lead Broker, DreamHouse Realty
(617) 555 - 0527

Michelle Smith
to me

Hi Lowell Salzberg,

You recently favorited [503 Park Drive](#) on [dreamhouse Realty.com](#). I'd love to talk with you more about this fantastic home. Feel free to give me a call so we can set up a viewing. Thanks!

Michelle Smith
Lead Broker, DreamHouse Realty
[\(617\) 555 - 0527](#)

API example

Sales Cloud

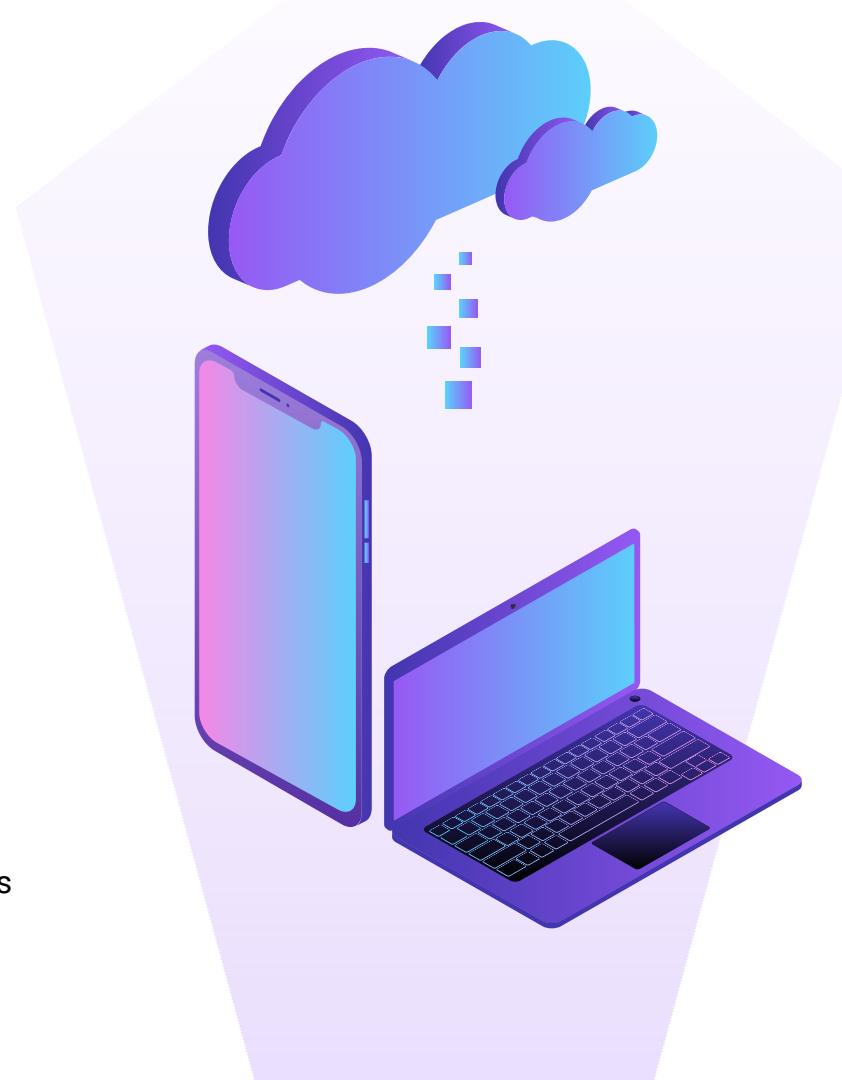
- sales automation and management
- streamline their processes
- manage leads and opportunities
- forecast sales
- track performance

Service Cloud

- customer service and support
- manage cases
- support requests
- service interactions across multiple channels

Marketing Cloud

- marketing automation and engagement
- create, manage, and analyze omni-channel marketing campaigns
- engage customers at every stage



Oracle Database and PostgreSQL
Access through security model

Relational database

- Lookup Relationship
- Master-Detail Relationship

Types of Objects

- **Standard Object**
 - already established within Salesforce
- **Custom Object**
 - create based on business' unique needs
 - data containers structured them using fields and records
- **External Object**
 - custom objects that map data outside of Salesforce



Customizable Dashboards and Reports

visualize and analyze their sales data in real-time

custom reports, charts, and graphs

track key performance indicators (KPIs), sales pipeline, and customer interactions

Workflow Automation

streamline sales processes and increase efficiency

automate repetitive tasks

Integration with Third-Party Applications

enables users to centralize their data and workflows, improving collaboration and productivity across different departments

offers a robust set of APIs and pre-built connectors

1. Increase agent efficiency with one customer view
2. Resolve disputes and refund customers faster
3. Automate agent tasks to onboard more merchants in less time
4. Replicate workflows across the business to spur growth

Uber Eats

HubSpot

HubSpot CRM

centralized database to store all customer-related information

Marketing Hub

suite of tools for inbound marketing activities

Sales Hub

manage pipeline, automate tasks, track interactions with prospects, and close deals efficiently

Service Hub

customer service and support

Content Management System (CMS) Hub

building and managing websites, blogs, and landing pages

Integration Hub

integrates with third-party applications and platforms to extend its functionality

APIs and Developer Tools

allows businesses to tailor HubSpot to their specific needs and integrate it seamlessly with existing systems

Sales Pipeline

visualize and track the progress of deals

Contact Management

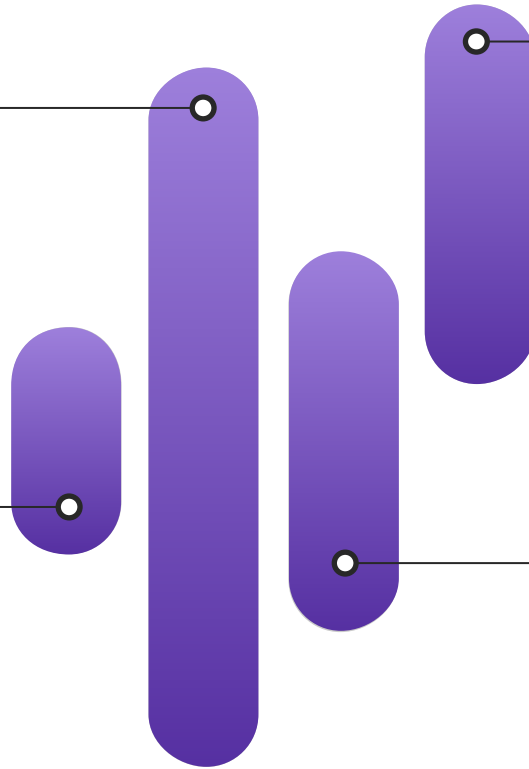
create, store, and organize contacts

Automation

automated workflows to streamline repetitive tasks

Reporting and Analytics

pre-built reports and dashboards

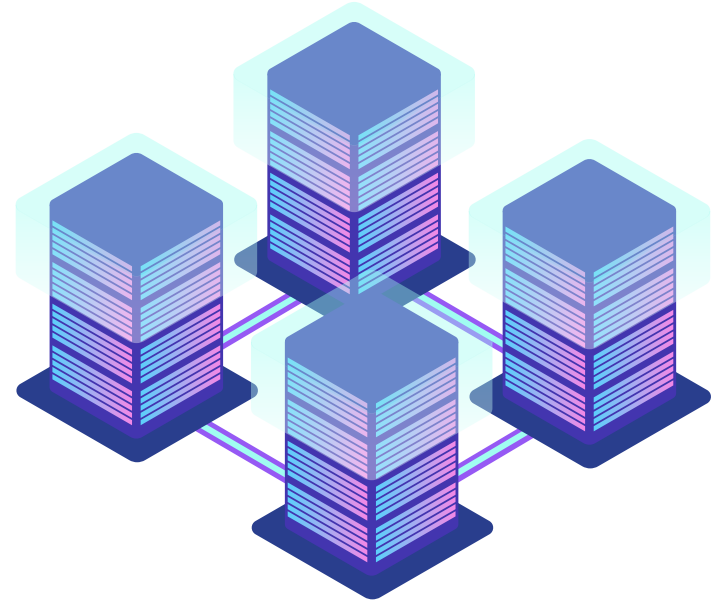


Relational database

utilizing Amazon Web Services' servers

Main Components

1. Objects
 - different types of relationships and processes
 - standard objects: contacts, companies, deals, tickets
2. Record
3. Properties
 - fields of information on a record



Contact Management and Segmentation

store and organize their contacts in a centralized database
segment contacts based on various criteria
enables targeted and personalized communication with contacts

Marketing Automation

automate various marketing tasks and workflows

Sales Pipeline Management

track and manage sales opportunities effectively
provides tools for seamless communication and coordination

Case Study: DOORDASH

 formstack



Manually
Integrated



Engineer must
hook up the form
to a database on
the backend



HTML, CSS
styling, and
JavaScript



Data cleaning
taking 10+
hours per
month

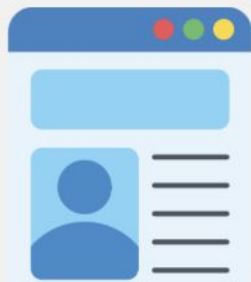


100% of
marketing
emails are built
from scratch

Case Study: HubSpot



Seamless
integration



Easily creates
personalized,
branded forms



Automatically
cleans data from
form fills before
saved into
databases



Marketing & Sales
collaboration to
secure leads via
email

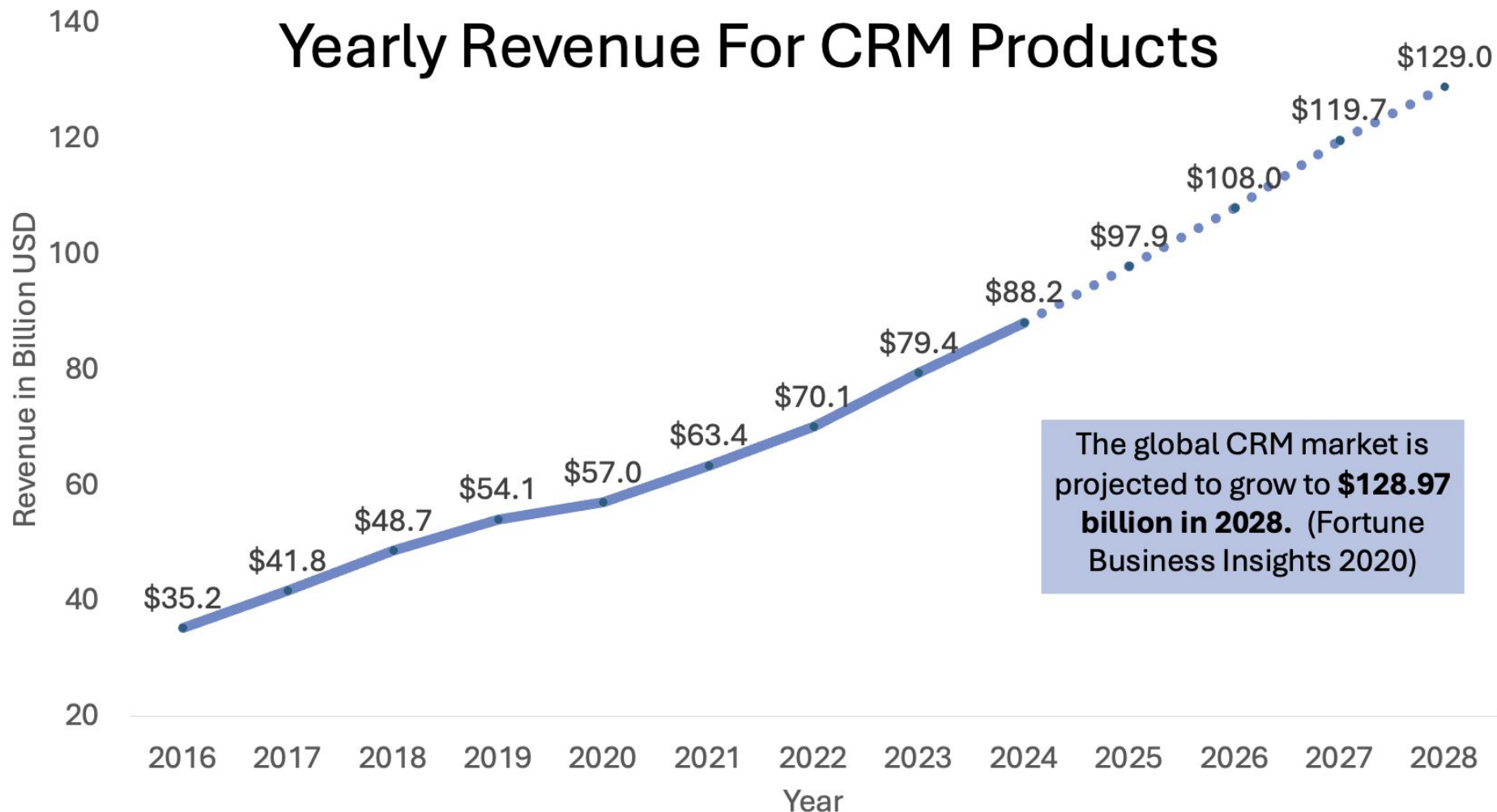


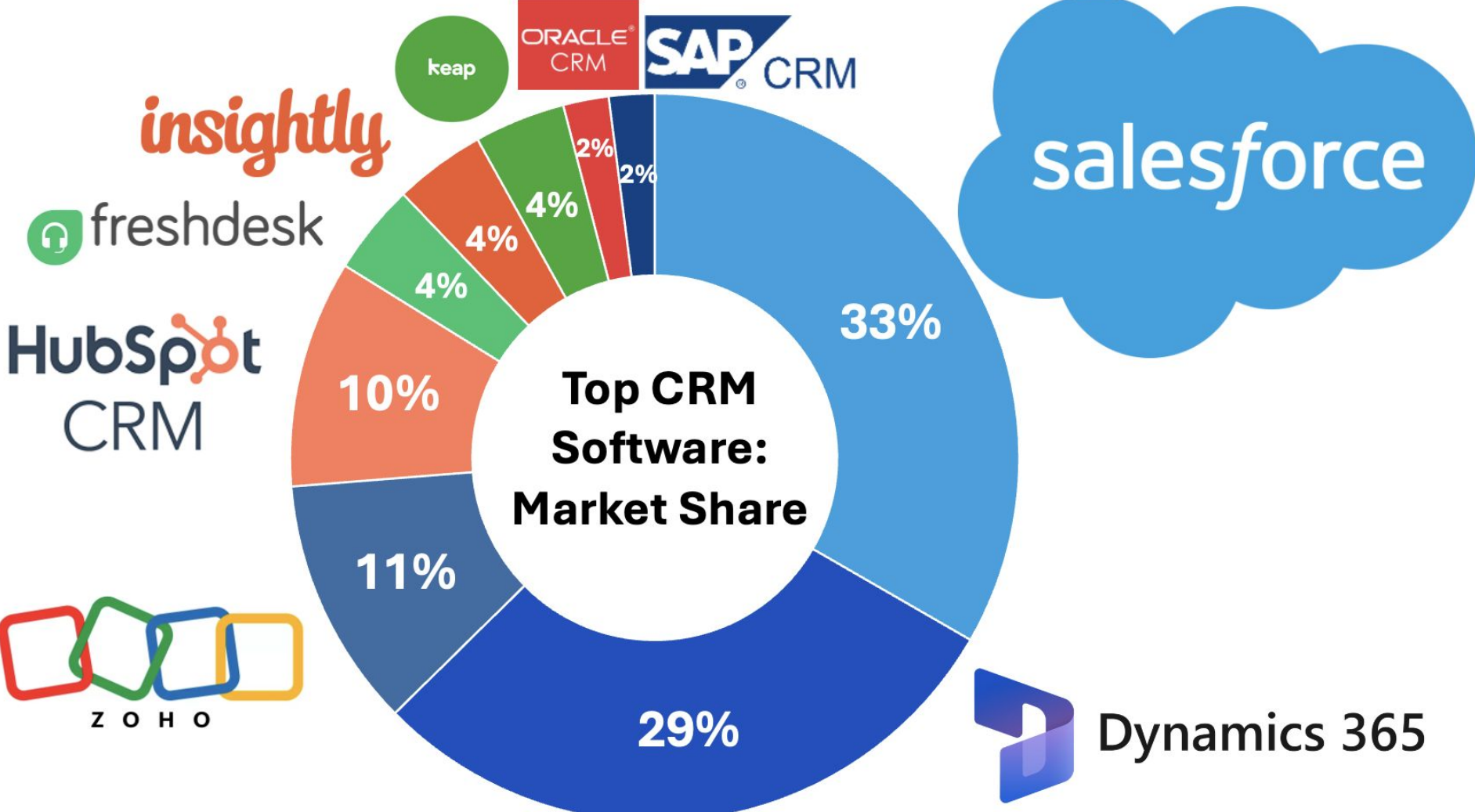
80% of emails
exist within
workflows

Marketing



Yearly Revenue For CRM Products





Marketing Strategies



Positioning

Top CRM provider with services
Market leader in CRM, offering a comprehensive and flexible cloud-based CRM solution.

Offers both CRM and ERP functionalities within a broader suite of business applications, known for its strong integration with the Microsoft ecosystem.

Renowned for its user-friendly CRM platform, especially effective in inbound marketing, and caters primarily to small to medium-sized businesses.

Strategy

Targets businesses of all sizes with a focus on the enterprise segment. Highlights innovation, offering cloud technology, AI, and platform expansion.

Targets medium to large businesses, capitalizing on seamless integration with Microsoft products and services.

Focuses on an all-in-one platform that's accessible and scalable, with a heavy reliance on content marketing to attract users.

Revenue

Tens of billions USD annually, indicating its leading position.

Grouped under Microsoft's larger segment, specifics on Dynamics 365 alone are not detailed.

Shows growth within the SaaS market and indicating a strong position in the SMB sector.

THE FIRST Commercial Computers

Starting in the **late 1950s** and **early 1960s** automation was eagerly adopted by companies with record-keeping concerns.



The **first computers** focused on maintaining accounting records in banks, stock exchanges, and government departments.

By the '70s, even small businesses could afford to **join the computing revolution**.



The Early Days of CRM



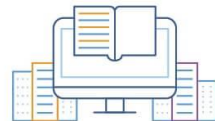
The **1990s** saw many new products that managed customer data.



Sales Force Automation (SFA) described products that were a combination of database marketing and contact management.



The market became more competitive when **Enterprise Resource Planning (ERP)** companies joined.



Goldmine (1990) and **Maximizer (1987)** provided off-the-shelf software, which made it more affordable for small businesses.



By the mid-1990s this market grew to include products of all shapes and sizes, now known as **Customer Relationship Management (CRM)** systems.
<https://www.salesforce.com/ap/hub/crm/the-complete-crm-history/>

CRM Today



The market for **new CRM products** continues to grow.



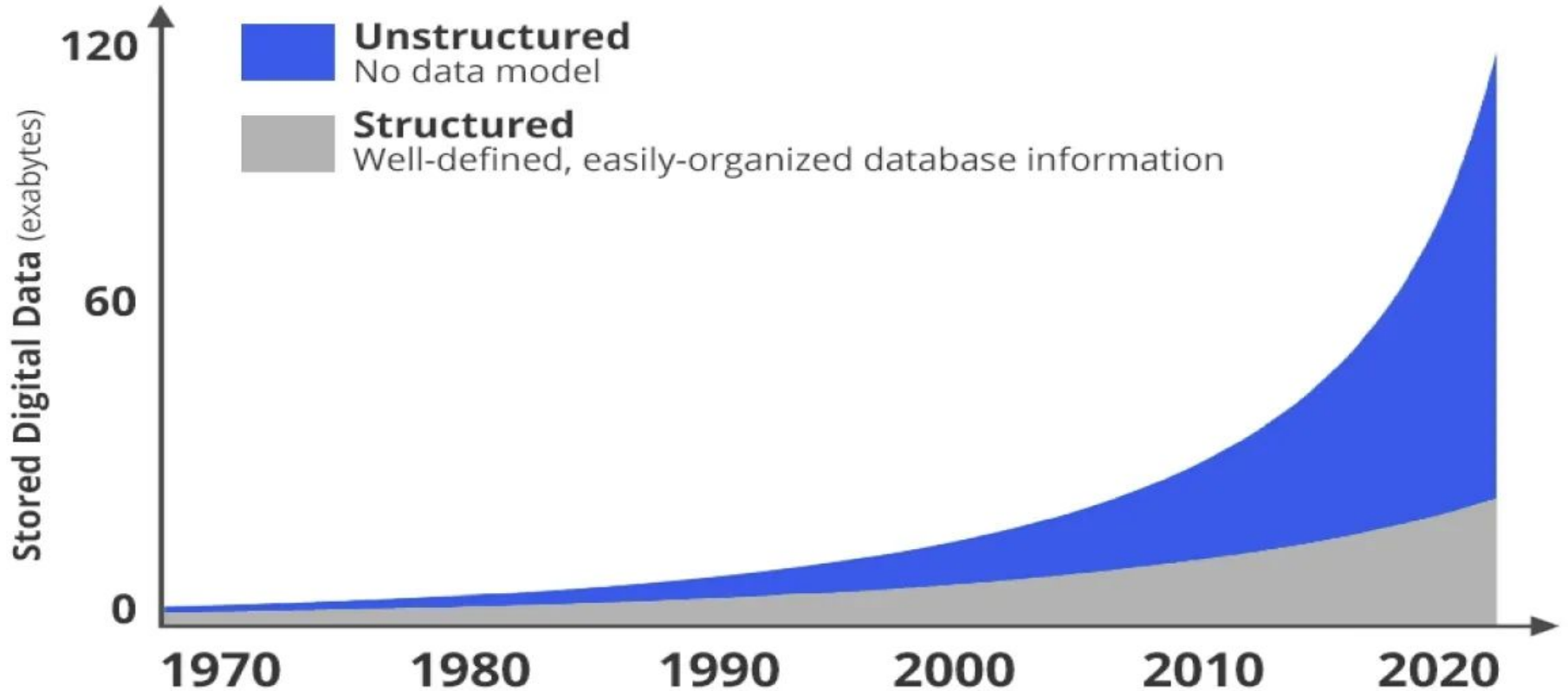
The **rapid pace of change** has many vendors battling to keep up with the latest developments.

The **latest shift** in CRM:

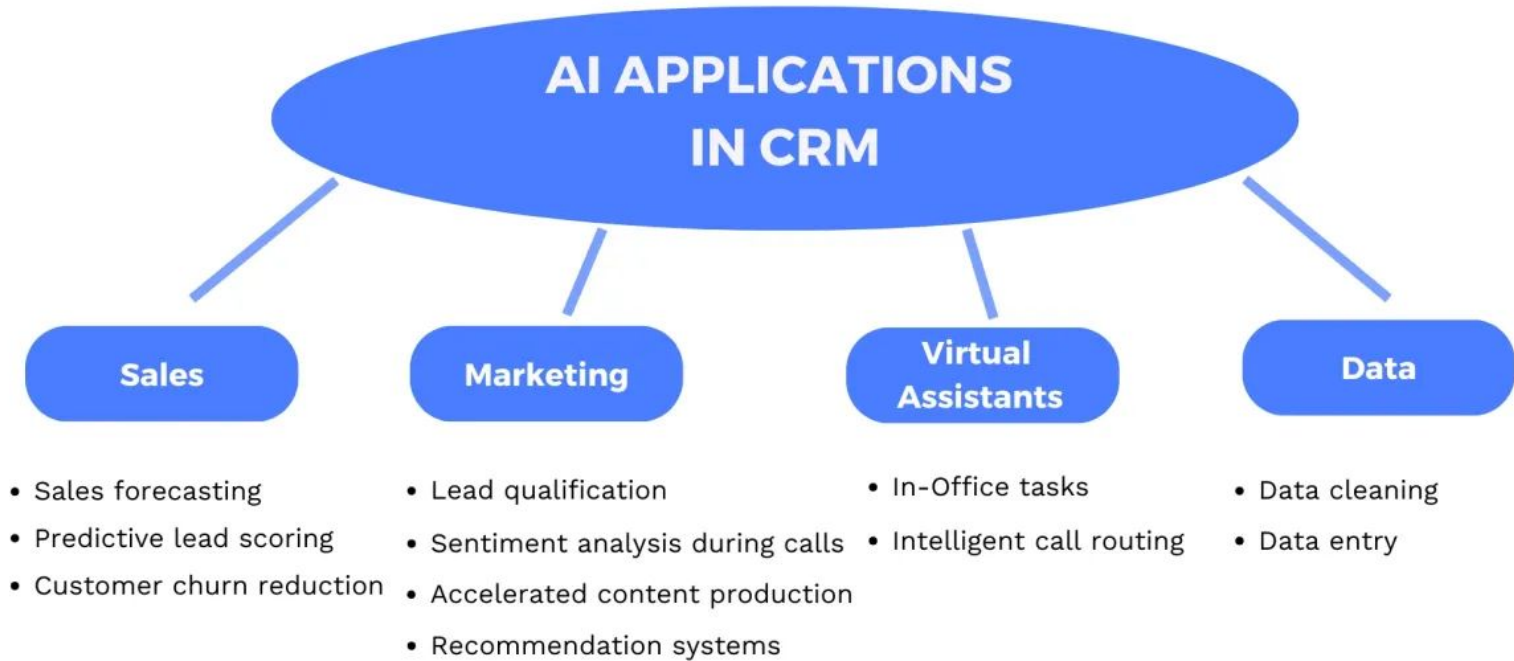


- Social data and the need to interact with customers on social platforms
- Mobile data with the advent of the smartphone

Future: Pivot toward AI



Future: AI automation



Sales

Related Compose

Einstein Sales Emails

Use your sales data and generative AI to quickly draft your next email.

Draft with Einstein

What do you want to do?

- Introduce Myself
- Send a Meeting Invite
- Nudge for Follow-Up
- Check in
- Reconnect

Marketing

Einstein Scoring

99 Lead Score

- Top Positives
- Top Negatives

89 Behavior Score

Top Activities

Lead

Name _____

Title _____

Company _____

- Segmentation
- Address



Customer Service

Case Number #00001528

Lauren Boyle
Loyalty Member

Can you help me set up my wifi?

Absolutely!

Einstein

Hi Lauren, the wireless router you ordered (Model: US4159) also requires a modem. What modem are you setting up today?

Adjust Edit Send Reply

Commerce

Commerce Product Workspace

All Products

Product Description

Current Text	Generated Text
Rugged leather wallet for all seasons.	A genuine leather wallet, handcrafted for all seasons and built to last a lifetime.



Research: CRM and Big Data

- [Anshari et. al 2019] details the application of big data to CRM software
- Big data enables aggressive, targeted advertising
 - Customers barraged by marketing everywhere - tend to ignore it
- Comprehensive view of customer's behaviors and interests, daily, through multiple channels
 - Personalized marketing more likely to be seen, greater sales opportunities
 - Framework of customer personas developed from profile information - age, gender, etc.
- Customer profiling
 - Amazon - recommendations based on past purchases
 - Builds brand loyalty and longer-lasting customer relationships

Research: CRM and chatbots

- [Youn & Jin 2021] explore how chatbots have affected customer relationships among tech optimists and skeptics
- Assistant and friend chatbots were tested
 - Assistant chatbots were believed to be more competent
 - Sincerity of chatbot was perceived the same
- Competent brand personality affected CRM outcomes through visit intention, satisfaction, and trust
- Friend chatbots strengthen parasocial interaction with customer
- Ideological perspective & chatbot relationships
 - Tech optimists view an assistant chatbot to be more sincere
 - Tech skeptics did not view assistant or friend chatbots to be sincere

Questions?

