# Customer Relationship Management

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CRM

# What are CRMs?

A CRM is a system for **managing all of a company's interactions** with current and potential customers.

Key Terms:
- **Omnichannel** - seamless experience across all channels like web & in-store
- **Pipeline** - stages to convert a lead into a customer

Example of what can be tracked:
- Sales Calls
- Customer Service Interactions
- Marketing Emails

Built for **companies of all sizes and industries** with the ability to integrate 1,000s of data points across multiple platforms

# Product Overview

## Lead & Contact Management

- Document Customer Data
- Record Calls, Chats, and Email History
- Identify and rank high-potential leads
- Track sales stages and progress

## Sales & Marketing Automation

- Send emails and reminders
- Create and track marketing campaigns
- Lead categorization
- Workflow Automation

## Analytics & Reporting

- Real-time Dashboards
- Forecasting and Predictions
- Custom Reports and KPIs
- Sentiment Analysis

## Integration & Customization

- Third-party App Integrations
- API and Developer Access
- Custom Fields and Workflows
- Mobile and Cloud Accessibility

# Product Overview

| | Salesforce CRM | HubSpot CRM | Zoho CRM |
|---|---|---|---|
| **Lead & Contact Management** | AI-powered lead scoring using Einstein and advanced pipeline management | Simple lead tracking with automated capture from forms & emails | AI-driven lead predictions and multi-channel engagement |
| **Sales & Marketing Automation** | Custom sales workflows, AI-driven forecasting, and enterprise automation | Drag-and-drop automation with built-in email and marketing tools | Omnichannel marketing with automation for email, SMS, and social |
| **Reporting & Analytics** | Advanced real-time dashboards and predictive insights | Simple, easy-to-use reports with sales and marketing tracking | AI-powered custom reports with trend analysis |
| **Integration & Customization** | Extensive integrations via AppExchange with deep customization | Native marketing and sales integrations with a user-friendly setup | Strong API support with over 800 app integrations and mobile CRM |
| **Pricing** | Anywhere from **$25** to **$500/month/user** | Anywhere from **FREE** to **$150/month/user** | Anywhere from **FREE** to **$52/month/user** |
| **Best For** | Large Enterprises | Small to Mid-Sized Businesses | Startups & low-budget users |

# Salesforce

## Technical Details

# Salesforce Product Ecosystem



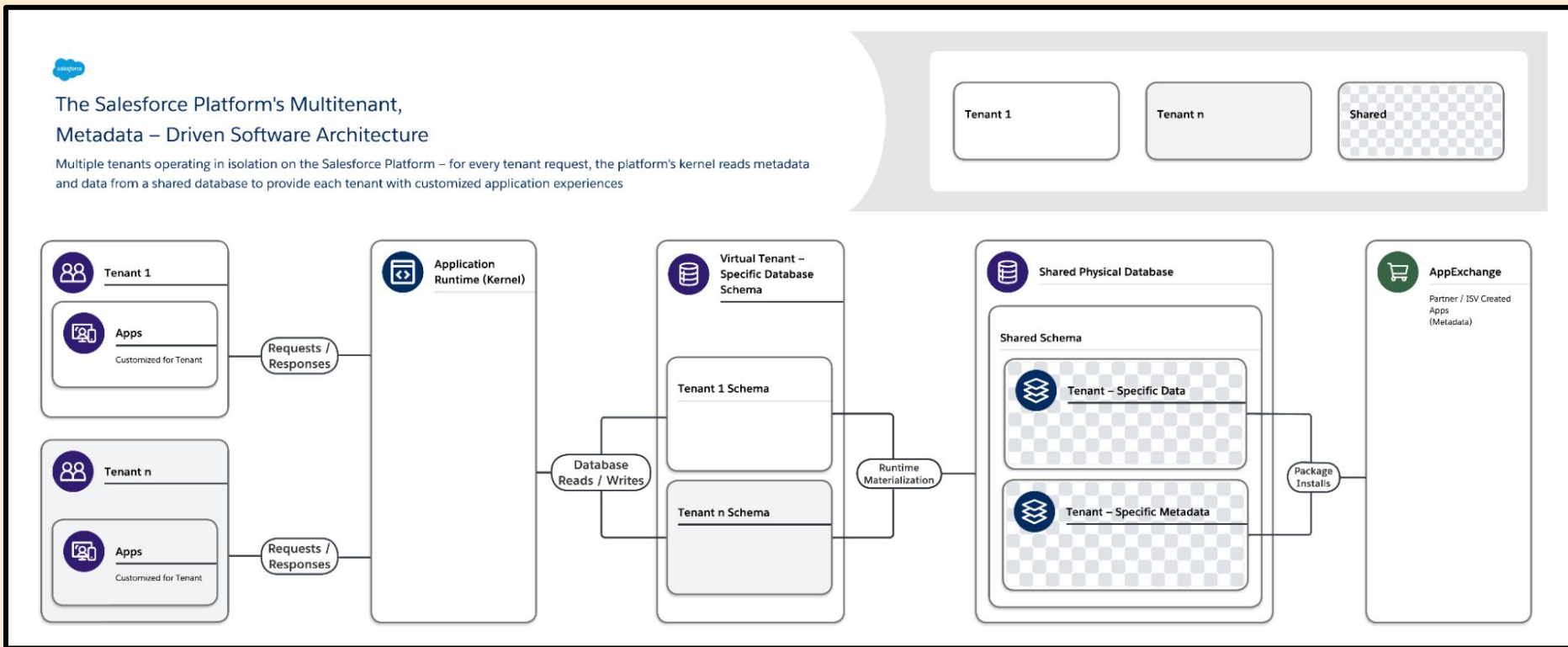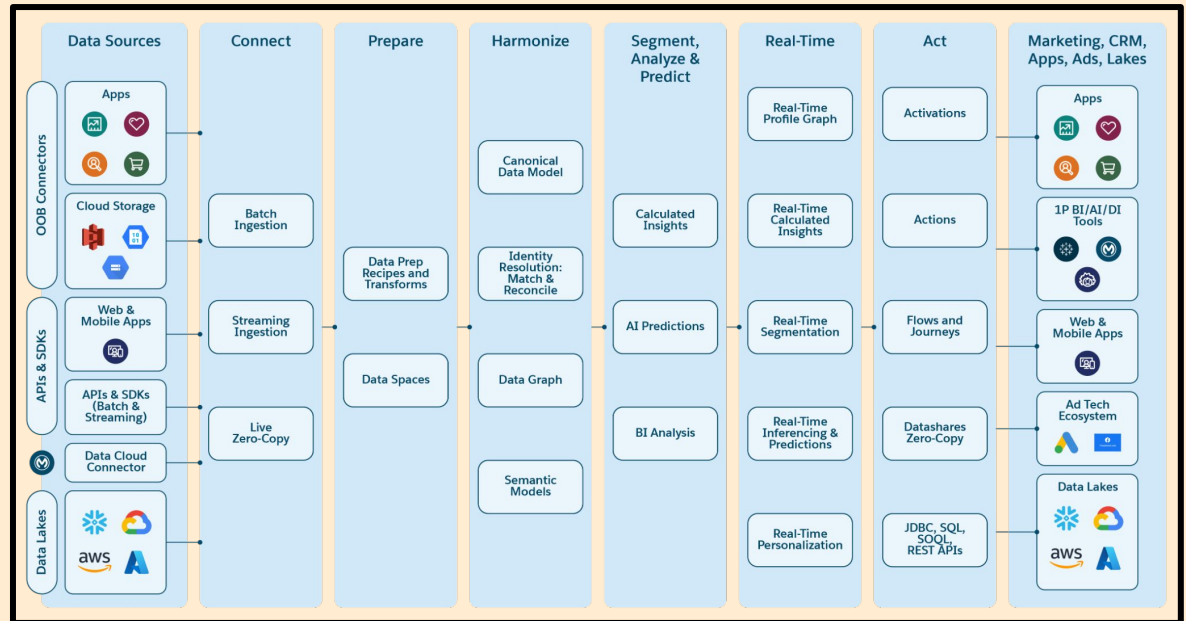Source: https://blog.nashtechglobal.com/what-is-salesforce-key-salesforce-products-you-should-know/
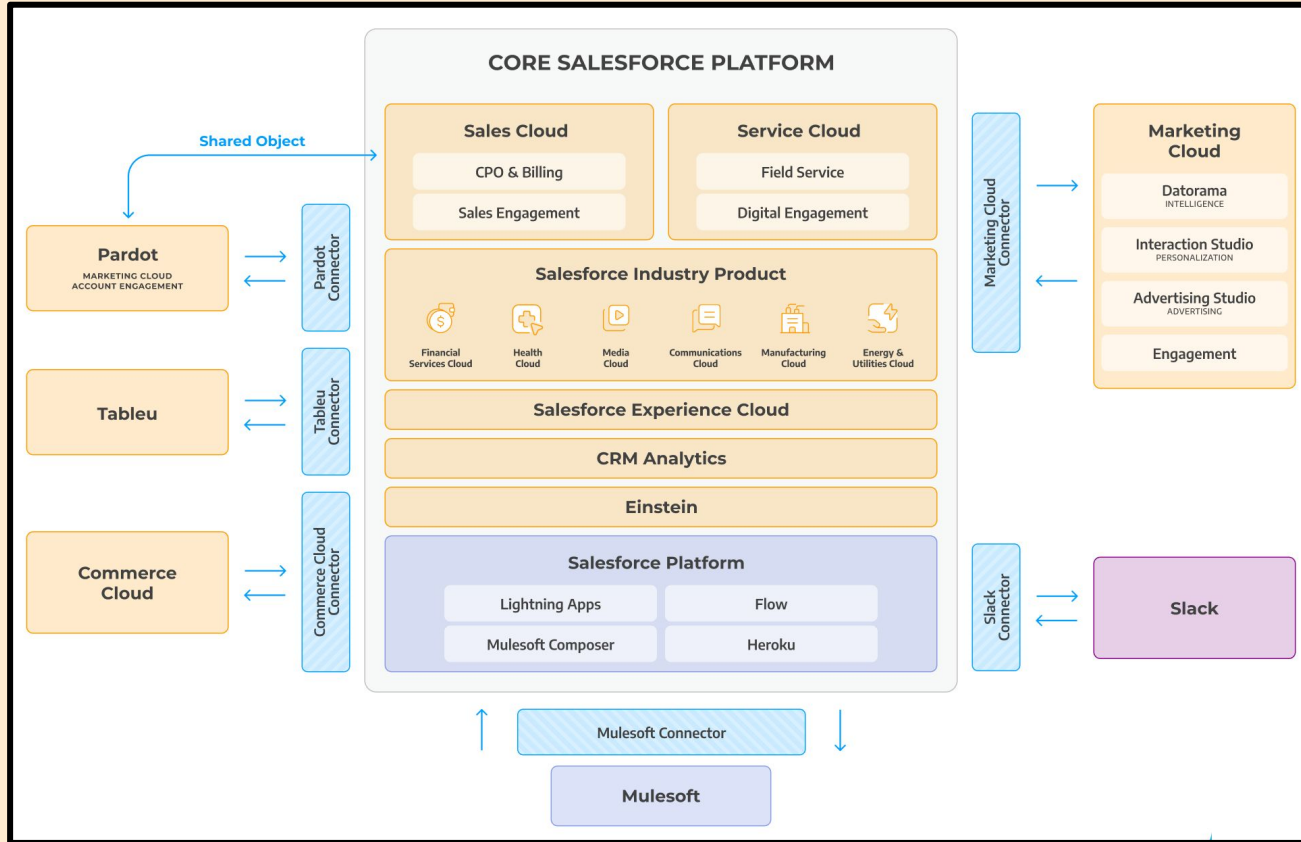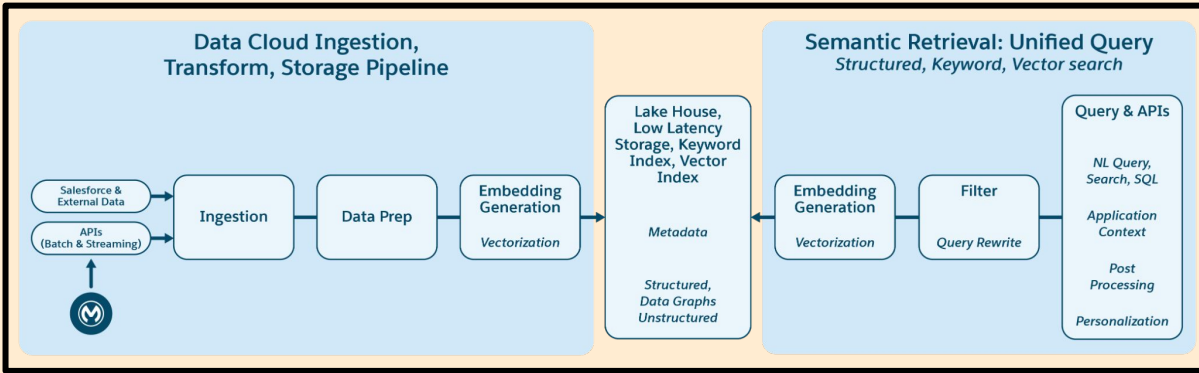
# Multi-tenant architecture

- Shared software infrastructure, data isolation, metadata-driven customizations, UI and business logic.

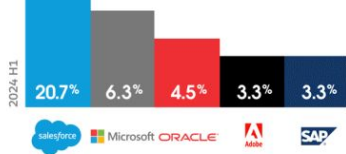# Salesforce Platform Internal Details

**Data Cloud Ingestion, Transform, Storage Pipeline**

- Salesforce & External Data
- APIs (Batch & Streaming)
- Ingestion
- Data Prep
- Embedding Generation — *Vectorization*

**Lake House, Low Latency Storage, Keyword Index, Vector Index**
- Metadata
- Structured, Data Graphs Unstructured

**Semantic Retrieval: Unified Query**
*Structured, Keyword, Vector search*

- Embedding Generation — *Vectorization*
- Filter — *Query Rewrite*

**Query & APIs**
- NL Query, Search, SQL
- Application Context
- Post Processing
- *Personalization*

**Data Sources**
- OOB Connectors
  - Apps
  - Cloud Storage
- APIs & SDKs
  - Web & Mobile Apps
  - APIs & SDKs (Batch & Streaming)
  - Data Cloud Connector
- Data Lakes

**Connect**
- Batch Ingestion
- Streaming Ingestion
- Live Zero-Copy

**Prepare**
- Data Prep Recipes and Transforms
- Data Spaces

**Harmonize**
- Canonical Data Model
- Identity Resolution: Match & Reconcile
- Data Graph
- Semantic Models

**Segment, Analyze & Predict**
- Calculated Insights
- AI Predictions
- BI Analysis

**Real-Time**
- Real-Time Profile Graph
- Real-Time Calculated Insights
- Real-Time Segmentation
- Real-Time Inferencing & Predictions
- Real-Time Personalization

**Act**
- Activations
- Actions
- Flows and Journeys
- Datashares Zero-Copy
- JDBC, SQL, SOQL, REST APIs

**Marketing, CRM, Apps, Ads, Lakes**
- Apps
- 1P BI/AI/DI Tools
- Web & Mobile Apps
- Ad Tech Ecosystem
- Data Lakes

Source:
https://architect.salesforce.com/fundamentals/platform-transformation

**Key Technical Differentiators of Salesforce:**

- Cloud-based architecture
- Robust customization capabilities
- Extensive AppExchange ecosystem
- Powerful data analytics tools
- Highly scalable metadata platform
- Robust AI integrations
- Multitenant architecture
- Complete CRM

# Salesforce

## Sample Applications

Managing sales pipelines

Tracking customer interactions

Automating marketing campaigns

Providing customer service support

Reporting and data analytics

Collaboration improvement

Sources:
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# Hubspot

## Technical Details
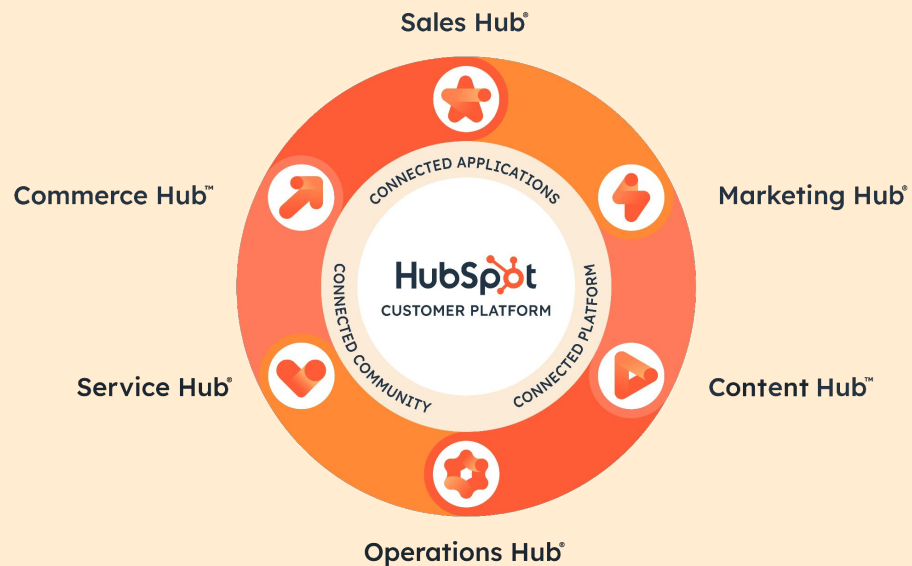
# The Framework

- DATA
- REPORTING
- AUTOMATION
- MESSAGING
- CONTENT

- **Cloud-based Platform**: HubSpot CRM is a fully cloud-based solution that allows for seamless integration with other tools and applications.
- **Automation & Workflows**: Provides robust marketing automation, email sequencing, lead nurturing, and sales pipeline management.
- **User-Friendly Interface**: Designed for ease of use with drag-and-drop functionality, customizable dashboards, and detailed reporting.
- **Integrated Tools**: Includes features for email tracking, contact management, sales analytics, and customer support within a unified system.

# CLOUD SERVICES

# API Architecture

**Internal Users**
- Internal Consumer
- Internal Consumer
- Internal Consumer

**Security**
- Identity Provider
- Internal Auth.

Direct Channels

External Consumer

External Consumer

**Global**
- External Consumer
- External Consumer

**External API Gateway**

Cached Responses

Logging

**CDN**
- Content Server
- Content Server
- Content Server

**Internal API Gateway**

**Legacy Application**
- Business Logic
- Internal Volume
- OS/Server

**Legacy Application**
- Business Logic
- Internal Volume
- OS/Server

ESB

**Infrastructure**

Hardware

Data Storage

**Containers**

**Monolithic Application**
- Business Logic
- Internal Volume
- OS/Server

**Microservice Application**

**Service Mesh**

Microservice
- Sidecar
- Business Logic
- Internal Volume
- OS/Server

Microservice
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# HOW IS IT DIFFERENT?

SMALLER COMPANIES
LOOKING TO SCALE

INTEGRATED ECOSYSTEM
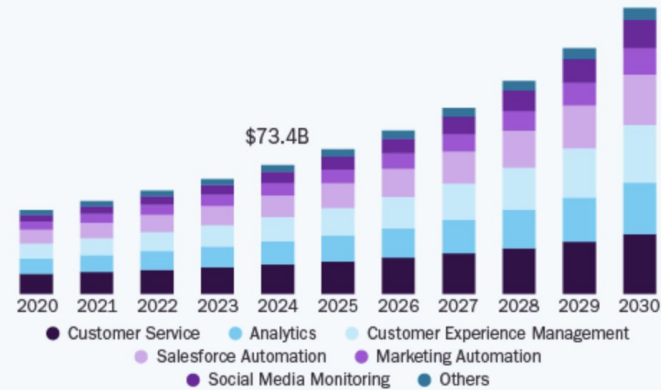
SEAMLESS INTEGRATIONS

INBOUND MARKETING
FOCUS

# Market Analysis



- $73.4B Market Size
- Mobile CRM Solutions driving factor for recent US growth
- Retail the most dominant sector using CRM
- Interacting with customers outside of the office
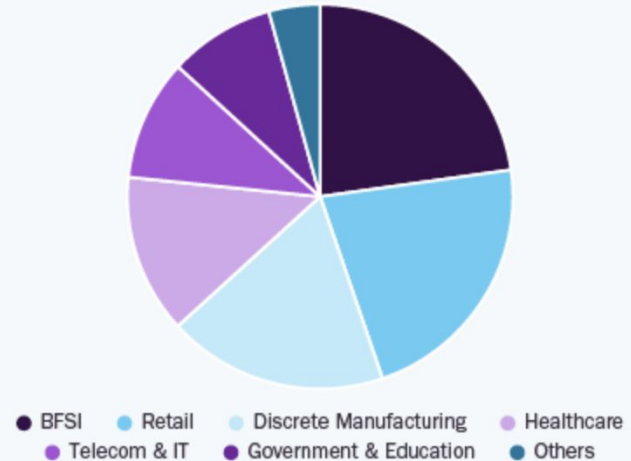
# CRM Business Survey

- 73% of businesses used CRM systems in 2024, 94% in tech used it
- Most businesses saw sales revenue increase by 21 - 30%
- CRM systems save employees 5+ hours a week
- 81% plan on increasing their CRM budget over the next year
- 91% had reduced customer acquisition cost
- Main goals: improve customer service, increase revenue, & enhance data analytics

**600+ businesses surveyed**



## How many hours per week does your CRM system save employees?

**94%** of businesses have seen **higher sales productivity** since using a CRM platform.

**65%** of businesses say their customer acquisition cost (CAC) **decreased by more than 10%** since implementing a CRM.

More than 15 hours — 17.4%

4 hours or less — 18.6%

11-15 hours — 20.9%

5-10 hours — 43.2%
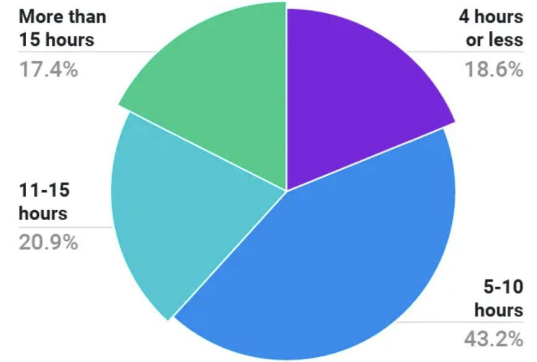
# Future Trends

## Automation

- Customer service done by a person, assisted by CRM systems
- For customer service or analytics
- With the rise of AI, customer service will become more and more automated
- Combining modern LLMs with a CRM database could filter out more problems before requiring an actual person to assist
- Ex: Agentforce

# Other Trends

## AI driven Data Analytics

- Don't have to manually collect and analyze data
- Predicting trends

## Operational Efficiency

- Automate repetitive task like data entry
- Increased focus on Mobile CRM allowing for better collaboration

## Increased Concern

- With the continued inclusion of AI there are concerns about issues with data privacy and high costs, especially with smaller businesses

## Increased Customization

- CRM platforms with more freedom to fit specifically with minimal coding

Market Analysis and Future trends video:

https://www.youtube.com/watch?v=mBkU77dmZXs

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