

SALESFORCE CRM

Learn about the market-leading CRM technology from RSM's Salesforce Practice



Presenters

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Agenda

- Salesforce CRM Introduction
- Salesforce's Unique Offerings
- NetSuite ERP to Salesforce CRM Integration
- Configure Price Quote (CPQ) Demonstration

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SALESFORCE CRM INTRODUCTION

Who Is Salesforce?



People

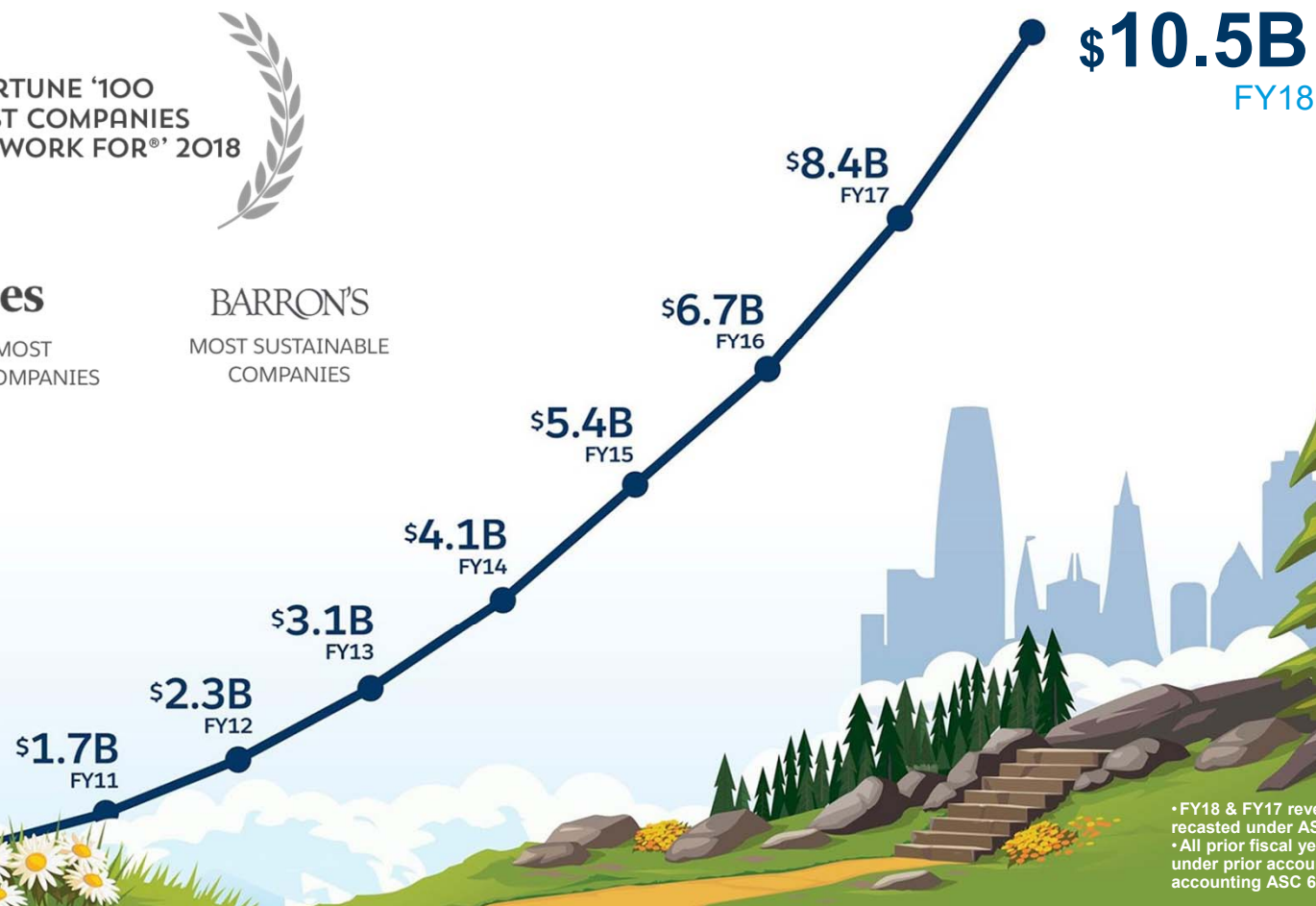
#1 TOP 50 COMPANIES
THAT CARE

Forbes

WORLD'S MOST
INNOVATIVE COMPANIES

BARRON'S

MOST SUSTAINABLE
COMPANIES



• FY18 & FY17 revenues as recasted under ASC 606.
• All prior fiscal years are under prior accounting accounting ASC 605.

2019 Gartner Magic Quadrant for Sales Force Automation

Gartner

Magic Quadrant for
Sales Force Automation

26 June 2019 Analysts:
Theodore Travis, Melissa
Hilbert, Adnan Zijadic, and
Ilona Hansen

Figure 1. Magic Quadrant for Sales Force Automation



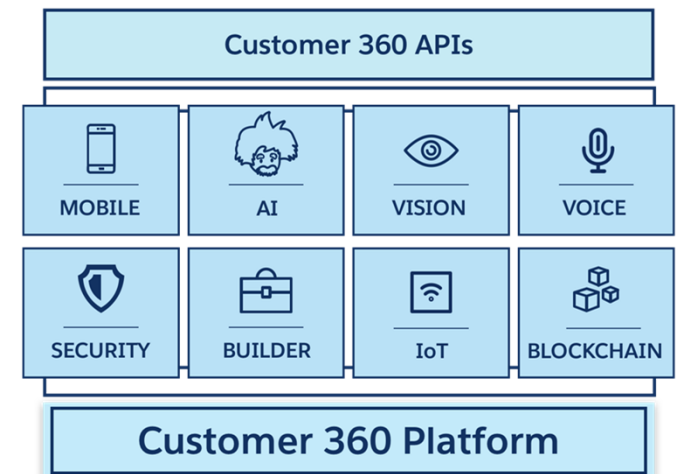
A LEADER
13 years
in a row

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Salesforce Customer 360



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SALESFORCE'S UNIQUE OFFERINGS

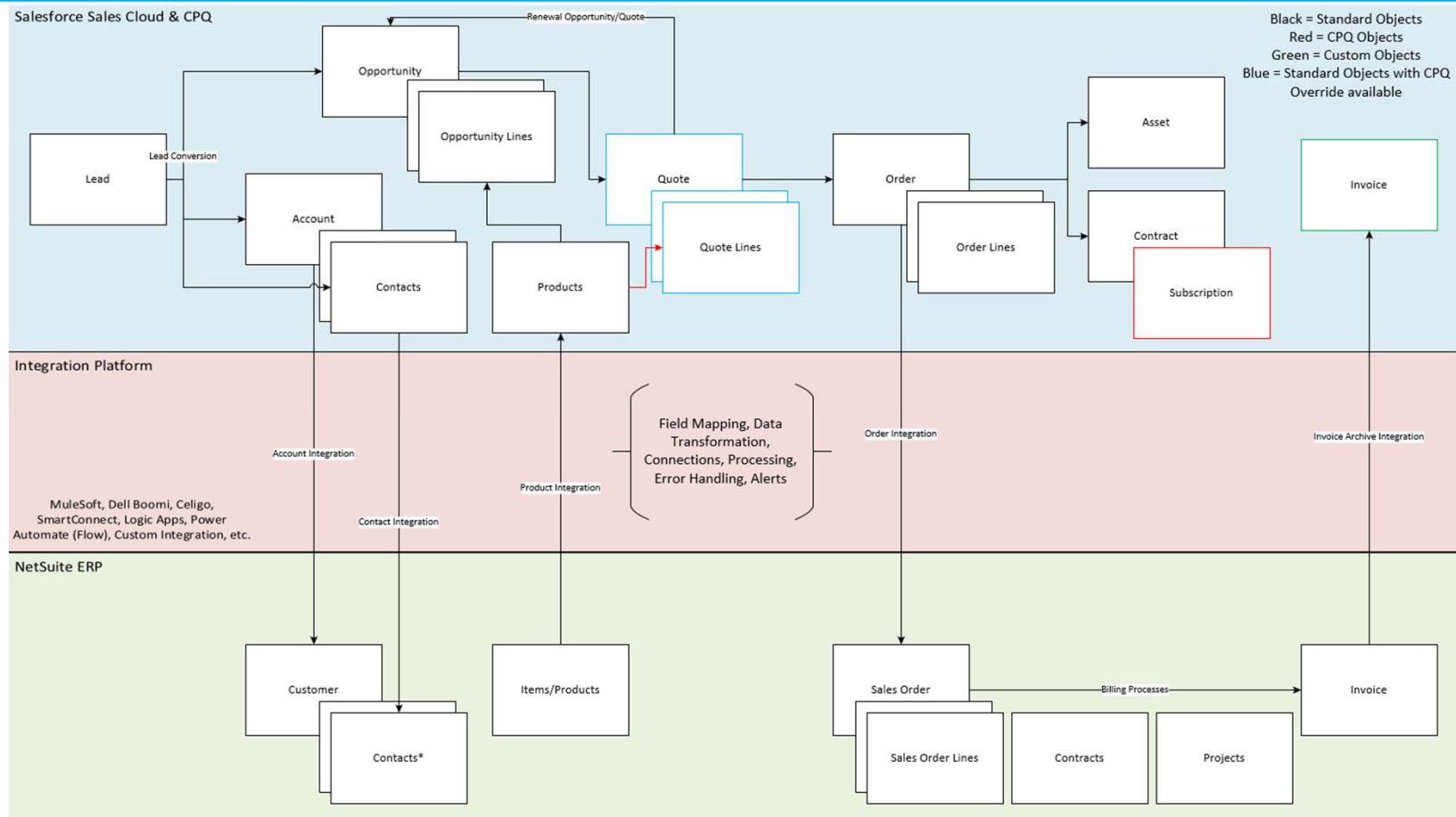
Salesforce Differentiators

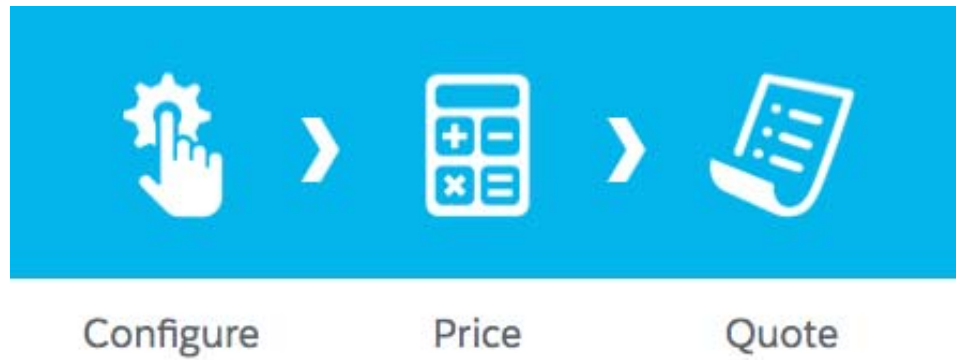
- Built-in Email Integration
- Social Selling
- Collaboration Tools
- Einstein AI-Enabled Platform
- Integrated Marketing Automation
- Robust CPQ Offering

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NETSUITE ERP TO SALESFORCE CRM INTEGRATION

NetSuite ERP to Salesforce CRM Reference Architecture





DEMONSTRATION

Salesforce CPQ Improves the Accuracy and Speed of the Sales Quote Process



35%

Reduces the number of quotes with configuration errors



38%

Reduces the number of quotes with pricing errors



29%

Increases forecast accuracy



33%

Reduces the time needed to generate a quote



30%

Reduces quote approval time




20%

Decreases time from quote to close

Source: "FY18 B2B Sales Report", Salesforce

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