

# SALESFORCE CRM



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



## Presenters

---

### Rob Miller

National Director  
Salesforce Practice



### Kurt Vannucci

Consultant  
Salesforce Practice



### Jake Broesch

Developer  
Salesforce Practice



## Agenda

---

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





# SALESFORCE CRM INTRODUCTION

# Who Is Salesforce?



**#1**

FORTUNE '100  
BEST COMPANIES  
TO WORK FOR® 2018



**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



## Magic Quadrant for Sales Force Automation

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



This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available upon request from Salesforce. From 2007-2014 Salesforce was recognized as salesforce.com.

Gartner does not endorse any vendor, product or service depicted in its research publications, and does not advise technology users to select only those vendors with the highest ratings or other designation. Gartner research publications consist of the opinions of Gartner's research organization and should not be construed as statements of fact. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

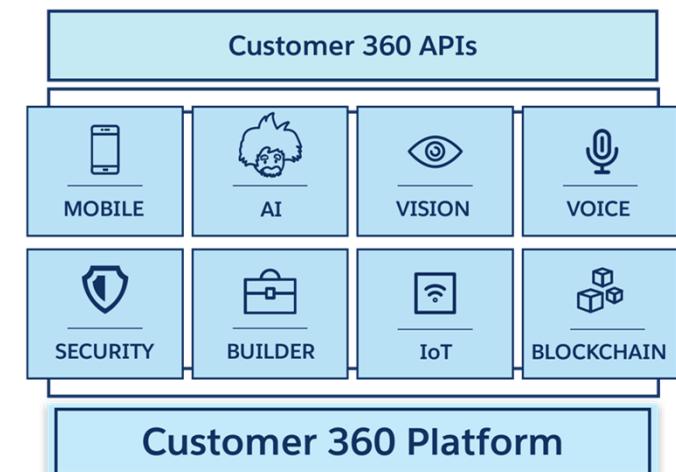
GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally. All rights reserved.

---

A LEADER  
13 years  
in a row

---

# Salesforce Customer 360





# SALESFORCE'S UNIQUE OFFERINGS

## Salesforce Differentiators

---

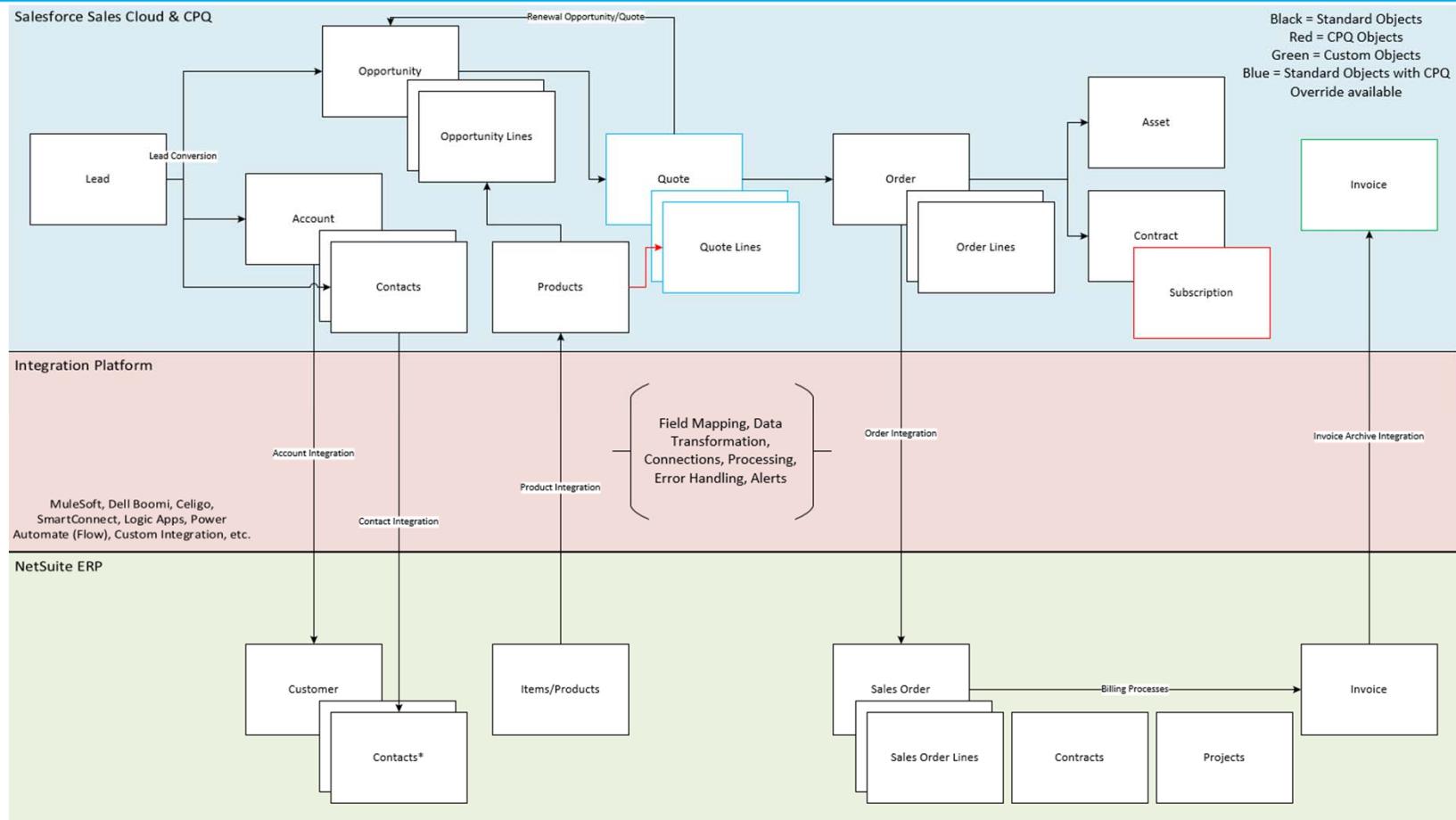
- Built-in Email Integration
- Social Selling
- Collaboration Tools
- Einstein AI-Enabled Platform
- Integrated Marketing Automation
- Robust CPQ Offering





# NETSUITE ERP TO SALESFORCE CRM INTEGRATION

# NetSuite ERP to Salesforce CRM Reference Architecture





Configure

Price

Quote

---

## DEMONSTRATION





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

© 2020 RSM US LLP. All Rights Reserved.

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute audit, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed.

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit [rsmus.com/aboutus](http://rsmus.com/aboutus) for more information regarding RSM US LLP and RSM International.

RSM® and the RSM logo are registered trademarks of RSM International Association. *The power of being understood®* is a registered trademark of RSM US LLP.

© 2020 RSM US LLP. All Rights Reserved.

